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**FACULTY OF AGRICULTURE AND FORESTRY**

FACULTY OF AGRICULTURE AND FORESTRY  
DEPARTMENT OF FOREST SCIENCES

**SUCCESSFUL ORGANIZATIONAL  
SOCIALIZATION FROM A SALES  
MANAGEMENT PERSPECTIVE IN A BUSINESS  
TO BUSINESS ORGANIZATION**

Pro Gradu Thesis

**FOREST ECONOMICS AND MARKETING**

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Tiivistelmä/Referat – Abstract <p>Employment dynamics within the Finnish forest industry are bound to go through change resulting from external forces such as digitalization, globalization and an aging workforce. This places pressure on the industry to attract capable talent while organizations will need to hire and train new employees for future organizational success. Organizational socialization is an integral link between the newcomer and the organization during the first months which influences integration and success of new employees. Onboarding which is often related to organizational socialization has been under researched in academic literature while practitioner literature offers some direction.</p> <p>This qualitative case study considers the impact of sales management principles of sales strategy, customer relationship management and sales technology on organizational socialization to discover which elements should be included in the onboarding process from a sales department perspective in a business-to-business organization. A research-based model of onboarding was utilized as a basis for this study. Thirteen semi-structured interviews were conducted within the case organization.</p> <p>This thesis indicates that there are three distinct factors that influence successful organizational socialization which should be considered when developing onboarding programs. First, previous industry and competitive environment knowledge accelerate organizational socialization. Second, there are numerous internal organizational factors that influence onboarding. Finally, sales strategy, customer relationship management and sales technologies should not be neglected when developing onboarding programs. The impact of sales management principles on newcomer self-efficacy, role clarity, social integration and knowledge of culture is complex and requires attention when developing onboarding programs that socialize new employees.</p> <p>In conclusion, this thesis provides much needed research and insight on the potential methods to develop and achieve onboarding outcomes. When socializing new employees, increased support is needed for those who do not have previous industry experience and increased structure assists in clarity. The onboarding program should have a longer scope than anticipated which clarifies targets to the newcomer. Sales technologies assist in information gathering as well as customer management but adoption stems from user-friendliness, organizational promotion and willingness to learn. Finally, sales mentors are valued and should be utilized during socialization of new employees.</p>			
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“I shall be telling this with a sigh  
Somewhere ages and ages hence:  
Two roads diverged in a wood, and I—  
I took the one less traveled by,  
And that has made all the difference.”

Robert Frost, *The Road Not Taken*

This passage by Robert Frost eloquently sums up my personal journey with this master's thesis. When I started my studies at the University of Helsinki, I had no clue I would conduct my thesis on human resource management increasing my personal knowledge within this academic sphere. To some extent, this has been an extremely enlightening journey while at the same time, it has had its own challenges. It goes without saying that it is a proud moment to be writing this section of my thesis.

First, I must give thanks to Metsä Board for allowing me to study such a challenging but interesting topic while providing me access to an abundance of stakeholders to interview. A special thank you goes out to Leena Yliniemi and the whole steering group who provided guidance and were involved within this project. A final thank you of course goes out to the interview participants. This research topic allowed me to learn and develop my skills which has been an exciting and challenging project.

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On to the next unknown road,

Niko Paavola

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# **1 Introduction**

## **1.1 Background**

The Finnish forestry sector has changed drastically since the rapid growth from the early 1980s. Positive developments from 2010 have led to stable demand for Finnish forest industry products except for printing and writing papers. In addition, innovation within the industry is thriving and business model renewal taking place.

Employment dynamics within the Finnish forest industry are going through a change due to digitalization, globalization and an aging labor force. The forest industry must be able to adapt to these changes and attract talent in an employment market with increased competition from different industries. As Finnish Forest Industries Federation (2018) indicates, one fourth of the workforce in the forest industry will reach retirement age within the next 10 years and a new, developed and competent workforce will be required in the future. In addition, industry restructuring is taking place with decline of established businesses and an emergence of new businesses and business models which could lead to increased labor pressures (Hetemäki and Hurmekoski 2016).

The forestry sector in Finland is a large employer which accounts to over 4% of the GDP (Lier et al. 2017). Research Institute of Finland (ETLA) highlights that UPM, Metsä Group and Stora Enso are ranked in the top 10 of the most significant companies in the Finnish economy (Ali-Yrkkö et al. 2016; Finnish Forest Industries Federation 2018). Figure 1 displays the production values for paper and paperboard in million tons (Finnish Forest Industries Federation 2018). It can be noted that paperboard has seen steady growth while printing and writing (\*including newsprint) has declined.

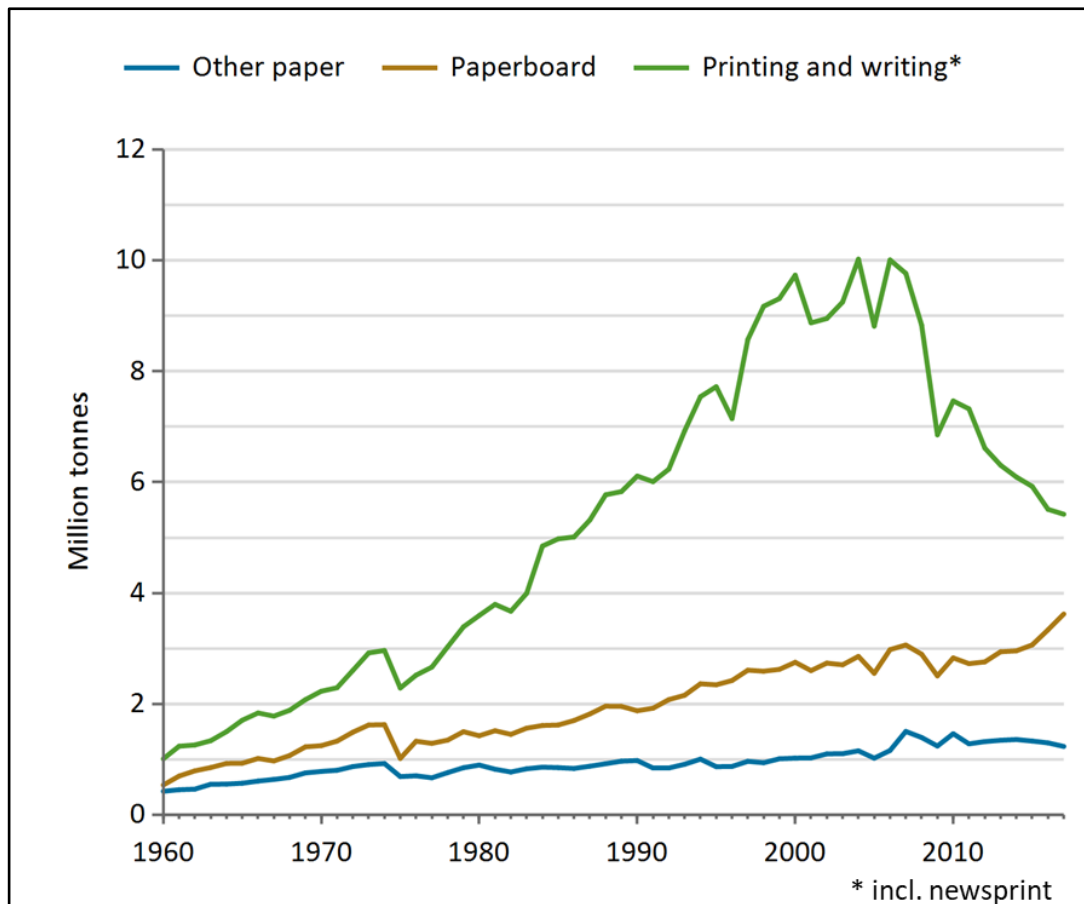


Figure 1. Production developments in paper and paperboard (Finnish Forest Industries 2008)

Increased consumer awareness and environmental conscientiousness of plastics has resulted in more opportunities for products based on renewable materials and is observed in the moderate growth in paperboard production (Pöyry 2018). In addition, many companies are piloting with new business models and innovation such as textiles from fiber raw material (Spinnova Oy, Infinited Fiber Company), startup accelerator programs to discover new ideas (Vertical & Stora Enso), sustainable packaging concepts (Sulapac Oy, Paptic Oy), and potential innovation companies (Metsä Spring). Nevertheless, traditional products are still in demand as many projects are long term and operations might not be feasible until the late 2020s (Finnish Forest Industries 2017).

In the near future a new generation of employees will enter the workforce and the entry of younger employees might pose challenges to traditional and older industries and companies. The new generation known as Millennials and Gen Z do not always judge



companies based on their financial performance or service offering but rather on the social and equitable status of the company (Kosonen 2018; Deloitte 2018). This has been referenced as the social enterprise (figure 2) in which the focus of the organization shifts towards working together with external actors and establishing collaboration and integration within the ecosystem (Deloitte 2018). To be successful as a social enterprise, organizations should develop relationships that span the whole network which challenges leaders to listen, act transparently, build trust and credibility as well as break down silos (Deloitte 2018). Furthermore, companies should attempt to create networks across the ecosystem and enable team collaboration between different functions.

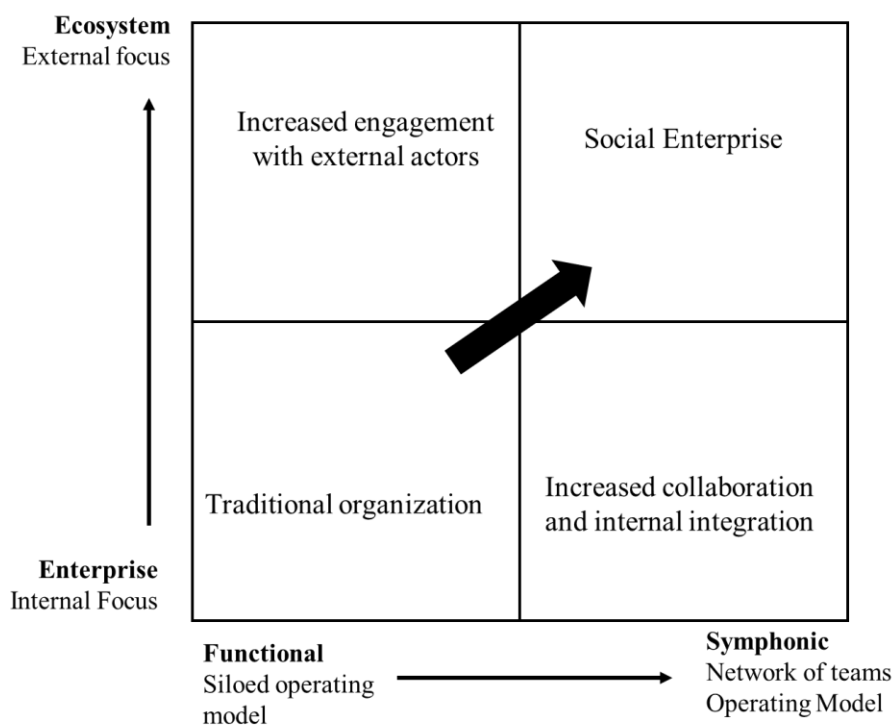


Figure 2. The evolution of a social enterprise (Deloitte 2018)

The social enterprise also requires new skills such as complex problem solving, social skills and cognitive abilities which organizations must utilize to be successful (Deloitte 2018). Furthermore, technical competency is no longer the most important skill, but resources should be gathered from different departments and efficiently optimized to solve complex issues. Experienced senior members are often sources of immense information and knowledge which should be taken advantage of (Deloitte 2018).

The forestry sector in Finland employs approximately 25,600 people from which 16,600 work in blue-collar positions and 9,000 in white-collar jobs. The median age within the sector is 46 years. Figure 3 indicates the number of people based on their age in blue collar and white collar positions.

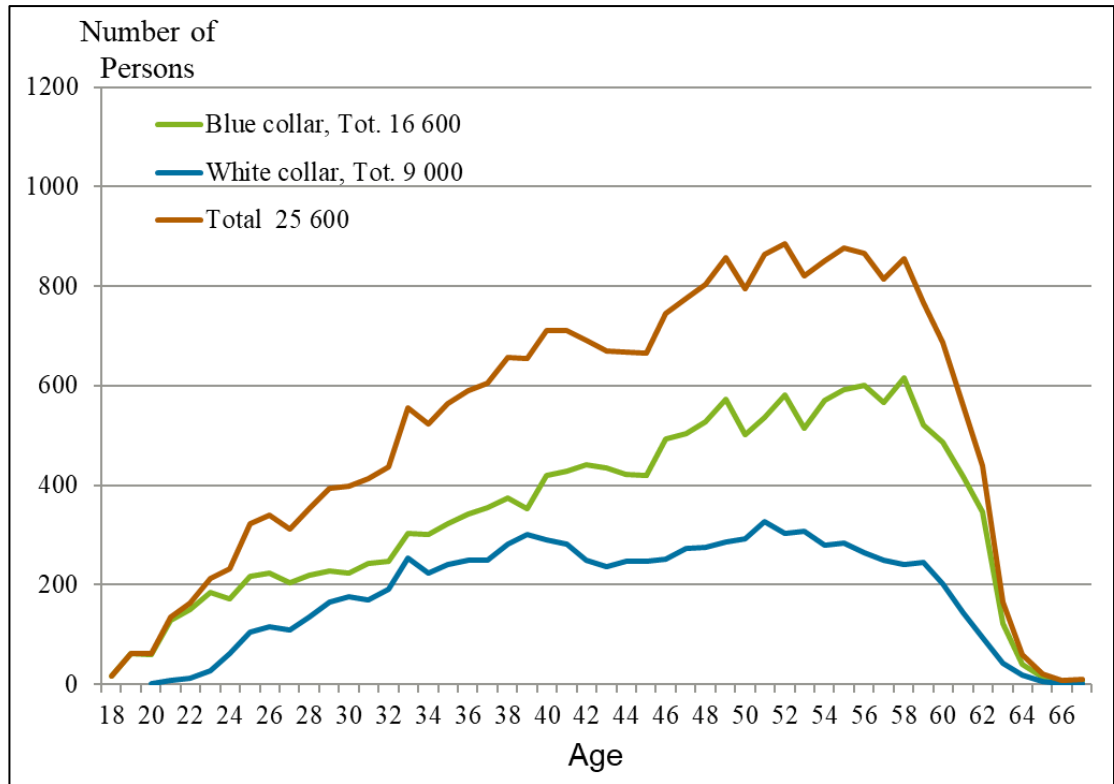


Figure 3. Finnish forest industry employee age structure (Finnish Forest Industries Federation 2018)

Figure 4 represents the statistics from Figure 3 and categorizes them according to age structure which is represented as percentages. These statistics indicate that the majority of the workers are between the ages of 40-59. In addition, especially in the white-collar jobs the low end of the spectrum is underrepresented with only approximately 10% of employees below the age of 29.

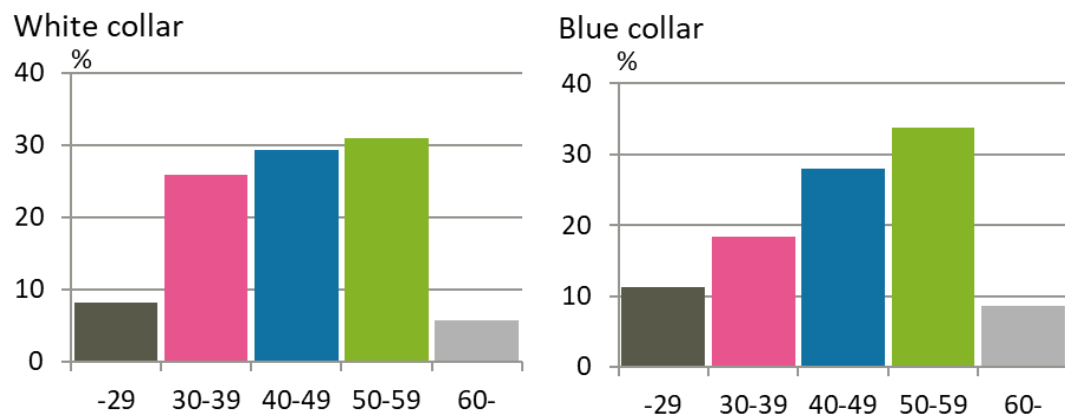


Figure 4. Age structure divided by categories (Finnish Forest Industries Federation 2018).

As these figures indicate, in the future there will be an increased need to hire new employees to many of the forest companies based in Finland. Onboarding plays a crucial role in developing individuals who understand the operating model of the company because it is the first point of contact between the employee and the organization. In addition, onboarding is significant for employees between the start-date and time to productivity while companies should benefit from increased employee retention if onboarding is done properly (Bauer 2011; Talmundo 2018). The costs of onboarding are often linked with employee retention and employee turnover and costs tend to vary greatly. However, most indications are that onboarding can cost anywhere between €2.800 to €10.000 depending on the seniority, role and salary (Boushey and Glynn 2012; Sundberg 2016; Talmundo 2018).

## 1.2 Aim and Purpose of the Study

The aim of this study is to discover which elements of sales management should be included in the organizational socialization process to accelerate the development of newcomers in a sales role in which the development of relationships occurs over time. The scope of the thesis is in human resources and sales management from which aspects of sales strategy, customer relationship management and sales force automation are examined due to the nature and importance of customer relationships in a business-to-business (B2B) environment.

The research questions develop attempt to discover possible effect of sales management practices on a newcomer to a sales role. This phenomenon is explored within the case organization which is introduced below. Therefore, the four research questions of which are discussed in the conclusions are as follows:

1. How do different factors in the onboarding program assist in successful integration to the organization?
2. How do salespeople understand their customers and develop relationships which should be conveyed to a newcomer in sales?
3. How do salespeople respond to sales strategy within the organization which a newcomer should understand?
4. What is the role of sales technologies when salespeople develop relationships with customers?

This thesis was commissioned by Metsä Board with the purpose of developing an onboarding program for the sales organization. Metsä Board produces high quality packaging boards which categorized to folding boxboards (FBB), food service boards (FSB), and white kraftliners (WKL). All of these products are produced from fresh fibers sourced from sustainably managed forests. Due to increased demand for sustainable materials coupled with megatrends such as population growth, urbanization and sustainability the growth prospects are good in Europe, Asia and Americas. These megatrends drive demand for lightweight and premium paperboards supported by increased consumer awareness of socially responsible companies. Finally, Metsä Board is committed to sustainability and bioeconomy as the company holds CDP A Lists for both climate change and water security (Metsä Board Annual Report 2018).

Metsä Board is a subsidiary of Metsä Group which consists of Metsäliitto Cooperative. Metsäliitto Cooperative is the parent company of Metsä Group and is owned by 103,000 forest owners. Other business areas within Metsä Group are Metsä Forest, Metsä Fibre, Metsä Wood, and Metsä Tissue.

From the annual report of Metsä Board (2018), it becomes evident that the average age for blue-collar workers is 46.7 years and for white collar employees 45.5 years. The

human resources department of Metsä Board provided additional statistics on the age structure (figure 5; figure 6). Figure 5 displays the age structure of Metsä Board and figure 6 displays the age structure of Metsä Board's sales organization. In both figures regions were divided to Europe and Middle East (EMEA), Asia Pacific (APAC) and Americas (North and South America). The results closely resemble those presented by the Finnish Forest Industries Federation.

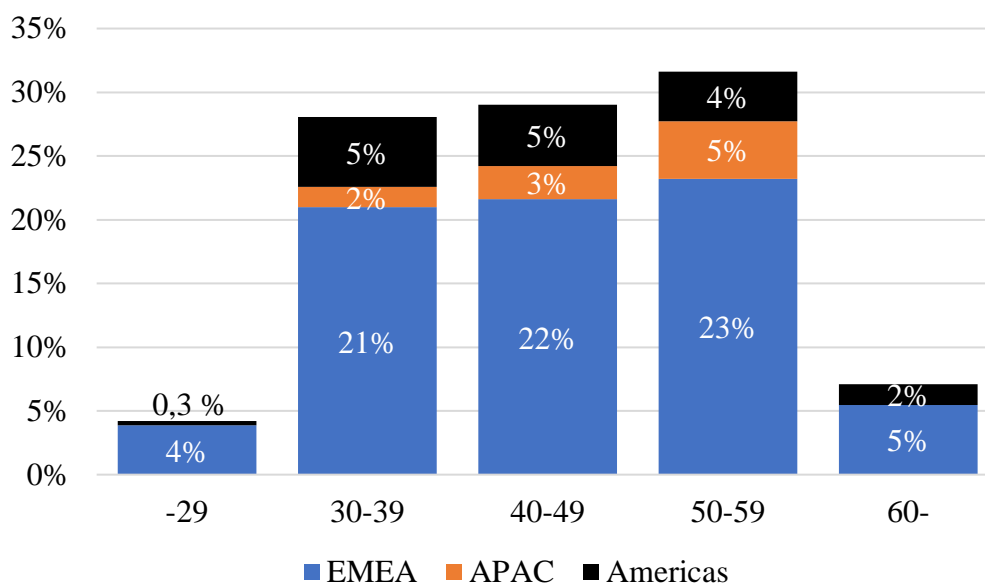


Figure 5. The age structure of Metsä Board (Statistics Provided by Metsä Board Human Resources)

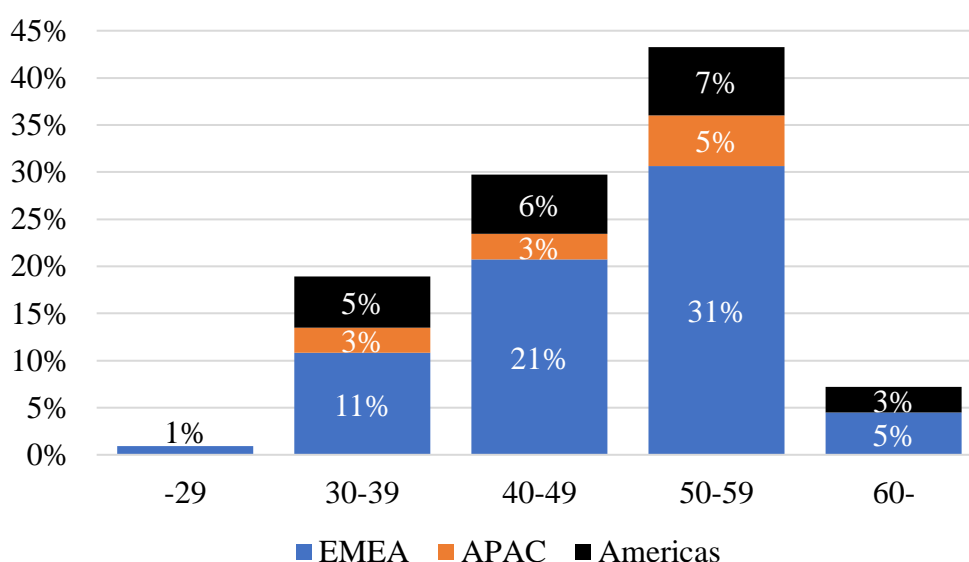


Figure 6. The age structure of Metsä Board sales organization (Statistics Provided by Metsä Board Human Resources)

As both figures indicate, the organization is heavily represented in the 40-59 age category especially in the sales organization which can pose a challenge in the near future. However, recent positive trends within employer branding conducted by Universum (2018) indicate that Metsä Group has increased their ranking within the top 100 companies in Finland. In 2019, the rankings improved slightly for both students and professionals in the business, engineering, and natural sciences categories.

### **1.3 Literature Review**

Organizational socialization is an important part of newcomer entry to an organization because as Van Maanen and Schein (1979) mention, it is a process by which newcomers obtain the skills necessary to be successful in their new roles and organizational socialization may occur throughout an individual's career with differing intensity depending on the change that may occur (Van Maanen and Schein 1979; Ashford and Nurmohamed 2012). The change a newcomer experiences during organizational socialization is often the result of career transitions and occur when switching jobs, changing work groups or departments, and during promotions. The organization should have an onboarding or organizational socialization program in place because it should reduce anxiety, stress and potential employee turnover (Ashford and Nurmohamed 2012; Kammeyer-Mueller and Wanberg 2003).

Van Maanen and Schein (1979) first developed the six classifications of organizational socialization and this classifications method was further elaborated by Jones (1986) who categorized them as institutionalized and individualized socialization. Jones (1986) discovered that the social aspects of socialization significantly influence role orientation and adjustments to an organization. Furthermore, institutionalized socialization generates newcomers who accept the status quo because newcomers experience activities designed by the organization (Jones 1986).

Additional research on institutional research support Jones (1986) findings that institutional socialization influences role ambiguity, role conflict and intentions to quit negatively while positively influencing job satisfaction and organizational commitment. Saks and Ashforth (1997) discovered that institutionalized socialization

positively correlates with organizational commitment, job satisfaction and task mastery while anxiety and intentions to quit were negatively influenced.

Institutionalized organizational socialization impacts newcomer adjustment in multiple ways. Jones (1986) findings indicate that institutionalized socialization influences role ambiguity, role conflict and intentions to quit negatively. On the other hand, job satisfaction, organizational commitment and a custodial role were positively influenced by institutionalized socialization. Individuals who possess high self-efficacy have the ability to shape their respective situations. However, institutionalized socialization tactics are especially beneficial for newcomers during the first six months because it provides newcomers with clarity and guidance during organizational entry (Jones 1986; Saks et al. 2007). Finally, two meta-analysis conducted by Bauer et al. (2007) and Saks et al. (2007) indicate that institutionalized socialization impacts role ambiguity, role conflict and intentions to quit negatively while self-efficacy, social acceptance, job satisfaction, organizational commitment and job performance were positively impacted.

In academic literature, organizational socialization and onboarding are often used interchangeably which may add to confusion (Klein and Polin 2012). Organizational socialization is the process by which employees learn about and adapt to jobs, expectations, roles and culture while socialization is an individual psychological process that occurs when attempting to integrate to the new organization or role (Van Maanen and Schein 1979; Klein and Polin 2012). Onboarding however, is an organizational initiated process or structure that facilitates newcomers through different means (Klein and Polin 2012). Klein and Heuser (2008) developed the inform-welcome-guide framework while Klein et al. (2015) when studying if, how, and when onboarding occurs within organizations. Interestingly, onboarding was often experienced by newcomers less often than organizations report using them and mentoring should be provided to newcomers which was also not often utilized. In addition, offering a variety of different mandatory practices to newcomers improved the socialization process.

Bauer (2011) developed a research-based framework which consists of self-efficacy, role clarity, social integration and knowledge of culture as indicators for successful

onboarding which is utilized within the research framework of this thesis (section 1.4). Finally, within the context of onboarding Bauer (2011) supports an institutionalized approach because as research indicates, formal onboarding processes have been more successful than informal techniques in the socialization of employees (Bauer et al. 2007).

Sales in the business-to-business (B2B) environment has shifted from a traditional order-taker perspective towards a customer-centric approach (Storbacka et al. 2009; Moncreif and Marshall 2005). According to Panagopoulos and Avalonitis (2010 p. 48) sales strategy is “the extent to which a firm engages in a set of activities and decisions regarding the allocation of scarce sales resources (i.e. people, selling effort, money) to manage customer relationships on the basis of the value of each customer for the firm.” This extends to many aspects but Panagopoulos and Avalonitis (2010) mentions four key areas which are customer segmentation, customer prioritization, relationship objectives and selling models, and multichannel sales. Within these four dimensions Terho et al. (2015) results indicate that customer segmentation impacts selling performance directly while prioritization and selling models have an indirect effect.

Strategy also provides the sales force with updated guidance on the focus areas which influences behavior and sales performance (Panagopoulos and Avalonitis 2010). However, the implementation of sales strategy within markets can be a difficult task (Terho et al. 2015) which requires transformational leaders who should be retained within organization (Panagopoulos and Avalonitis 2010). To successfully transform organizations towards customer-centrism should be focused on within the organization. Töytäri and Rajala (2015) further argue that building value with customers is extremely important for future organizational success in competitive markets. When value-based selling is conducted effectively, conversion rates should increase because the seller understands the customers’ business needs and crafts compelling value-based arguments influencing customers purchase decisions. Value co-creation is also possible within value-based selling because the seller facilitates customer performance and target realization. This should reduce price sensitivity (Töytäri and Rajala 2015).



Customer relationship management is an important aspect within sales management because it relates to managing interactions between the company and their respective clients (Soltani et al. 2018). Superior customer relationships should also lead to sustainable competitive advantages (Barney 1991, ref. Wang and Feng 2012; Srivastava et al. 2001). The terminology within customer relationship management (CRM) often lacks clarity and in many cases, CRM is often utilized to indicate an IT solution of managing customer data (Payne 2006). However, a strategic definition of CRM emphasizes an “holistic approach to managing customer relationships in order to create shareholder value.” (Payne and Frow 2005 pp. 168). Chen and Popovich (2003) indicate that companies who implement multiple approaches to customer relationship management successfully benefit from increased loyalty and profitability.

The four key elements of customer relationship management are strategy development, value creation, multichannel integration, information management and performance assessment processes (Payne and Frow 2005). However, as indicated by Töytäri et al. (2015), organizations might not have the knowledge to create value-based arguments. Companies are required to continuously monitor and develop CRM capabilities to improve customer proactiveness and analyze technology implementation (Wang and Feng 2012). Furthermore, Saarijärvi et al. (2013) mention that customer data and relationship management has not been studied in academic literature when businesses are moving from product to service orientation, but customer data should be utilized effectively to better serve customers, develop improved relationships with customers, and utilized to integrate customer resource allocation.

Sales technology and sales force automation (SFA) should enhance sales performance and result in increased profits form companies. SFA technologies include personal productivity aids, personal management tools, functional tools, and process aids which are all interconnected and integrated (Homburg et al. 2010; Jelinek et al. 2014). Nevertheless, many large-scale harmonization and implementation projects fail due to sales force rejection (Homburg et al. 2010). Adoption of sales technologies should mitigate the risks involved with many projects but often sales professionals possess negative self-efficacy with new technologies (Mathieu et al. 2007) and management must address organizational culture and the demographics of the organization when implementing technology (Pearson et al. 2002). In addition, managers and

organizational leaders must support organizational change initiatives to realize results and increase adoption (Methieu et al. 2009; Homborg et al. 2010). Hunter and Panagopoulos (2015) study indicated that an obligation to adapt and embrace change to new technology is a strong enabler for technology adoption and routinely utilizing new technologies within organizational duties and tasks increase sales performance and positively influence customer-orientation. Conversely, if sales processes are too rigorous the benefits of technology are marginalized (Hunter and Panagopoulos 2015). Finally, upper management plays a key role in technology adoption because as Cascio et al. (2010) study highlights, the highest commitment to SFA are a result of top management commitment which cannot be counteracted by line manager or supervisor commitment. Therefore, management should focus on clearly communicating the benefits of new technology implementation and study the salesforces alignment to technology.

#### 1.4 Research Framework

This study attempts to discover how sales strategy, customer relationship management and sales force automation have an impact on onboarding (figure 7). These three aspects were chosen with an assumption that these have the greatest impact on newcomer onboarding within a sales role in the case organization in order to successfully manage customers.

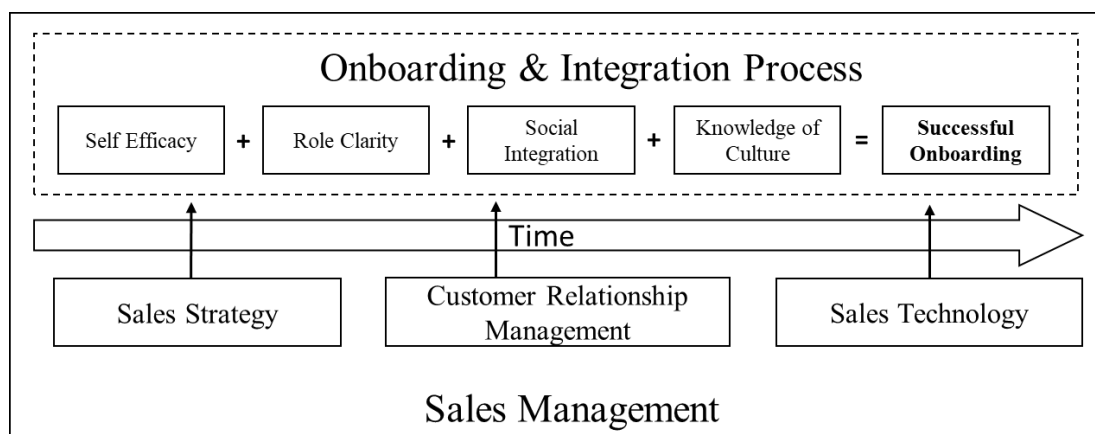


Figure 7. Research Framework (adapted from Bauer 2011)

This thesis utilizes the case organizations sales force as a context to study the sales management principles and the potential impact on onboarding. Therefore, the selection of candidates was not included within framework. However, it needs to be stated that selection of potential candidates does have a potential impact on onboarding as well. An assumption been made that the selection has been completed and the positional change or new employees is about to commence on a new role based on identification of valued behaviors (Bauer 2011). Sales strategy, customer relationship management and sales force automation should influence the success factors of onboarding: self-efficacy, role clarity, social integration and knowledge of culture. As the literature review suggests, if onboarding is done correctly multiple benefits are realized for the organization and the employee which include increased job satisfaction, organizational commitment, lower turnover, higher performance levels, career effectiveness and lower stress.

As academic literature within organizational socialization and onboarding suggest, the terms surrounding organizational socialization and onboarding are confusing. The context of organizational socialization has been studied quite extensively yet the effective development and implementation of onboarding programs has not been studied in academic literature. Therefore, this thesis develops literature within the onboarding field which can be considered as lacking academic input. In addition, there is a gap in literature about the degree of which onboarding activities facilitate organizational socialization (Klein and Polin 2012).

## **1.5 Overview of Methodology and Structure of Thesis**

This thesis will utilize an empirical case study framework which provides an excellent opportunity to study aspects of sales management and its possible influence on an onboarding program from a sales organization point of view. Case studies are often an overlooked tool in science. However, case studies provide the research with the opportunity to understand the phenomena occurring within the organizational setting and provide ample possibilities to study the organizational context in depth (Yin 2003; Saunders et al. 2007).

Data was collected by conducting 13 semi-structured interviews with keys sales personnel within Metsä Board sales organization (Annex 1). Those who were interviewed held both managerial and nonmanagerial positions and were located in Europe, North America and Asia. The country specific context contributes to the thesis scope because differences between cultures and specific onboarding practices can be studied within the sales management setting. Semi-structured interviews were used to understand the relationships between the different variables studied and the semi-structured interview method provides opportunities for the researcher to probe into questions in order to add significance. All interviews were transcribed and analyzed using categorization analysis and thematic analysis. For further detail on the methodology, consult section four.

The structure of the thesis is as follow. As indicated within the research framework, aspects of sales management consisting of sales strategy, customer relationship management and sales force automation (section 3) will be examined in depth to identify key elements which have a potential impact on organizational socialization and onboarding (section 2). Section 4 describes in detail the research design and methodology. Findings from the semi-structured interviews are analyzed and clarified in section 6 and finally, section 7 is dedicated to the discussion of the findings. Section 8 concludes by answering the research questions developed.

## **2 Organizational Socialization**

Organizational socialization is a complex process that is experienced when going through change during career transitions. In the case of newcomers, organizational socialization is the ability to fit in to the organization and become a productive member. For the organization, effective socialization should yield committed and productive individuals as quickly as possible (Ashford and Nurmohamed 2012). In addition, organizational socialization is the process by which newcomers acquire the knowledge and skills necessary for a specific organizational role (Van Maanen and Schein 1979). How employees are socialized and what organizations do in the socialization process can influence several important outcomes. For the organization outcomes include performance, commitment, retention and employee satisfaction. Effective organizational socialization of newcomers influences anxiety, stress, and potential turnover (Ashford and Nurmohamed 2012; Kammeyer-Mueller and Wanberg 2003).

Organizational socialization occurs throughout an individuals' career with differing intensity depending on the change a newcomer potentially experiences. There are three distinct boundaries that may be crossed in which organizational socialization occurs where a newcomer may experience different intensities of change. First, from outside to inside the organization, second, when transferring to a different group within an organization and finally, between two levels of the organization such as getting promoted (Van Maanen and Schein, 1979; Ashford and Nurmohamed 2012). Therefore, organizational socialization is an ongoing issue within organizations and for individuals because employees change roles, new employees are hired, and high performers are promoted.

### **2.1 Organizational Socialization Tactics**

Organizational socialization tactics have been the most studied aspect of socialization literature and mostly comprise of Van Maanen and Schein (1979) six tactics and Jones (1986) institutionalized and individualized socialization. Organizational socialization tactics are the methods used by organizations to structure newcomer experiences when

transitioning from one role to another (Van Maanen and Schein 1979; Gruman and Saks 2012). Further elaborated by Chao (2012), tactics are the processes by which organizations structure socialization and the methods in which individuals gather information to learn to adjust. In addition, socialization is an individualistic approach taken by the newcomer and therefore, multiple different tactics can be used for effective socialization (Chao 2012). However, the six tactics established by Van Maanen and Schein (1979) are not a comprehensive list because they should be flexible to change depending on technology, new ideas, and culture. Nevertheless, the six tactics have been widely used and studied in academic literature without much change throughout the years.

#### 2.1.1 The Six Tactics of Organizational Socialization

Van Maanen and Schien (1979) indicated that newcomers respond to socialization by taking either the custodianship stance, content innovation stance or a role innovation stance based on the tactics that exist on a bipolar continuum (Saks and Gruman 2012; Chao 2012). The custodian role is one of the easiest to take because newcomers do not want to challenge the status quo. Therefore, the individual learns the requirements of the job and utilizes skills and knowledge learned to successfully complete tasks due to the organization successfulness. Content innovation assumes a more proactive stance in altering the current role and the newcomer aspires to create improvements and changes in the role's knowledge base and strategies. In this case, the role is accepted but the newcomer is not satisfied in the strategies or technologies used to accomplish tasks which may lead to the newcomer circumventing traditional norms. Role innovation occurs when the newcomer rejects all ideas presented and learned and attempts to redefine role itself (Van Maanen and Schein 1979). The tactics of socialization can influence the stance the newcomer takes during organizational entry and explanations are provided below (table 1).

Table 1. The six tactics of organizational socialization (Van Maanen and Schein 1979; Chao 2012)

<b>Organizational Tactic</b>	<b>Description</b>
Collective vs. Individual	Collective tactics are done in group contexts with similar newcomers while individual tactics are not.
Formal vs. Informal	Formal tactics separate the newcomer from organizational members. Informal tactics are less structured by organizations.
Sequential vs. Random	Sequential tactics are designed to engage the newcomer in different stages or experiences in order to be accepted to the organization. Random are characterized by one stage or an ambiguous sequence of steps.
Fixed vs. Variable	Fixed tactics provide a timetable for transition from newcomer to member. Variable tactics do not communicate any predefined time expectations.
Serial vs. Disjunctive	Serial tactics involve organizational members who serve a role models and help in newcomer adjustment. Disjunctive tactics do not provide this.
Investiture vs. Divestiture	Investiture tactics accept newcomer individuality and their needs are addressed. Divestiture takes away individuality so newcomers are like others. Individual needs are below the organization.

Van Maanen and Schien (1979; Chao 2012) theorized that custodial role orientation was a result of sequential, variable, serial, and divestiture tactics while content innovation resulted from collective, formal, random, fixed and disjunctive tactics. Finally, role innovation, where no structure is in place is a result of individual, informal, random, disjunctive, and investiture tactics.

### 2.1.2 Institutionalized and Individualized Socialization

Jones (1986) further elaborated on Van Maanen and Schein (1979) tactics and developed a classification for the six different tactical dimensions (table 2). Jones grouped custodial role responses under institutionalized socialization and innovative role responses to individualized socialization. In addition, these tactics were placed under context, content and social categories. Context specifies the method in which information is provided, content is the information that is provided and social is the facilitation required during the learning process. Institutionalized socialization encourages newcomers to accept roles and comprises of structured and formal socialization process that reduces uncertainty and anxiety. On the other hand,

individualized socialization which does not have a clear structure in place encourages newcomers to question the status quo. Furthermore, Jones (1986, p. 266) noted that social tactics are the most important during organizational socialization because it provides “the social cues and facilitation necessary for the newcomer during the learning process.”

Table 2. Classification of socialization tactics to institutionalized and individualized socialization (Jones 1986)

	<b>Institutionalized</b>	<b>Individualized</b>
<b>Context</b>	Collective Formal	Individual Informal
<b>Content</b>	Sequential Fixed	Random Variable
<b>Social</b>	Serial Investiture	Disjunctive Divestiture

Most academic studies focus on Jones (1986) classification and therefore, it needs to be mentioned that there is a difference between Van Maanen and Schein (1979) and Jones (1986) categorization of socialization tactics due to different logical reasoning. Jones (1986) claimed that the custodial response will result from fixed and investiture tactics while the variable and divestiture will result in an innovative response. This is different to Van Maanen and Schein (1979) in which the fixed and investiture tactics provide newcomers with opportunities to challenge the status quo instead of accepting the status quo.

Jones (1986) findings indicate that social aspects of socialization (serial and investiture) are the most significant in influencing role orientation and adjustments to an organization. Furthermore, the content and context aspects lower uncertainty especially during entry to an organization. Even with Jones (1986) findings, consequent studies have not focused or investigated these aspects and the effect on newcomer adjustment and socialization.



### 2.1.3 The Impact of Institutionalized Socialization on Newcomer Adjustment

Institutionalized organizational socialization impacts newcomer adjustment in multiple ways. Jones (1986) findings indicate that institutionalized socialization influences role ambiguity, role conflict and intentions to quit negatively. On the other hand, job satisfaction, organizational commitment and a custodial role was positively influenced by institutionalized socialization. Individuals who possess high self-efficacy can shape their respective situations nevertheless, institutionalized socialization tactics are especially beneficial for newcomers during the first six months because it provides newcomers with clarity and guidance during organizational entry (Jones 1986; Saks et al. 2007).

Further research supports the role of institutionalized socialization. Saks and Ashforth (1997a) study that combined the aspects of the individual and the organization on the relationship between organizational socialization tactics, information acquisition and socialization outcomes discovered that institutionalized socialization positively relates to organizational commitment, job satisfaction and task mastery. In addition, anxiety and intentions to quit were negatively impacted by institutionalized socialization. In this case, the amount of information gathered by the newcomer mediates the relationship between tactics and their relative outcomes. This had an impact on organizational commitment, job satisfaction, and task mastery while job performance, intentions to quit and turnover were impacted slightly (Saks and Ashforth 1997a). The effectiveness of socialization practices greatly depends on the characteristics and motivation of the newcomer to realize the benefits of socialization (Saks and Ashforth 1997b).

Of importance are also two meta-analyses on socialization tactics conducted by Bauer et al. (2007) and Saks et al. (2007). In both studies, institutionalized socialization impacts role ambiguity, role conflict and intentions to quit negatively while self-efficacy, social acceptance, job satisfaction, organizational commitment and job performance were positively impacted. In addition, Bauer et al. (2007) findings support those of Saks and Ashforth (1997a) that information seeking actions done by newcomers is an important factor in reducing uncertainty. In addition, institutionalized

socialization tactics provide the organization more control to shape newcomer experiences and learning (Ashforth et al. 1997).

Jones (1986) results also indicate that individualized socialization results in a role innovative orientation during entry to an organization. Furthermore, individualized socialization programs lack structure and may lead to increased anxiety in early work experiences (Ashforth et al. 1997a). Saks and Ashforth (1997a) study support Jones (1986) notion that the social and context processes of socialization are most important with regards to newcomer information acquisition. A structured manner of providing information by organizational insiders such as colleagues and managers also support the socialization process (Saks and Ashforth 1997a). Learning and training in the form of observation, experimentation and involvement facilitate the success of organizational socialization outcomes. Companies may utilize induction training to support organizational socialization, yet the short term and general nature of these programs often does not support socialization of newcomers enough (Ostroff and Kozlowski 1992; Saks and Ashforth 1997b).

Organizational entry may be a difficult time for newcomers. In this case, newcomers proactively seek new information in order to regain control of the situation and environment. Proactive behavior should lead to improved performance and satisfaction but the desire for control can be an individualistic approach (Ashford and Black 1996). Therefore, newcomers that actively understand their desire for control are more involved in finding information, creating networks, and negotiate more job changes. In addition, these newcomers attempt to create a positive frame around the new environment (Ashford and Black 1996). Proactivity also influences the socialization process as higher extraversion and openness are directly associated with improved feedback seeking and relationship building (Wanberg and Kammeyer-Mueller 2000).

With the support for institutionalized socialization, human resource departments should attempt to develop structured or institutionally oriented socialization programs in order to be successfully integrate newcomers to their respective roles. Organizational socialization should be carefully planned to facilitate the development of newcomers who become organizational insiders that are committed to their roles.

In addition, socialization programs should be planned with the user in mind in order to account for individualistic differences that may arise due to personalities. Research to date suggests that organizations and individuals play a large role in the socialization process which influences employee satisfaction, commitment, retention and performance (Wanberg 2012). Organizational socialization also transmits organizational culture from the organization to the new employee which may shape attitudes towards to organization (Bauer et al. 1998 ref. Saks and Gruman 2010).

## **2.2 Socialization Agents**

Socialization agents are an important part during the socialization process of newcomers. Socialization agents are the people involved during the socialization process that facilitate newcomer learning by providing information and feedback (Bauer et al. 1998; Klein and Heuser 2008). Occasionally during the socialization process mentors are assigned to newcomers that assist in the integration to the company. However, socialization agents can be supervisors and other colleagues as well. Most importantly, the agents assist the newcomer in understanding the role requirements and expectations of the role but are often informal instead of formal processes. Socialization agents should assist the newcomer in defining the social network within the organization (Saks and Gruman 2012).

Socialization agents are important sources of information and provide the newcomer with social support during organizational entry. Newcomers to an organization primarily rely on the observation of others for information which is followed by managers and colleagues as sources of information (Ostroff and Kozlowski 1992). When obtaining knowledge, experimentation and observation are the most useful (Ostroff and Kozlowski 1992). Supervisors also play an important role during the socialization process. Positive socialization outcomes are often related to supervisor support as an information source to obtain knowledge about the role and task (Ostroff and Kozlowski 1992). Information acquisition also provides an opportunity to build informal social networks within the organization. (Ostroff and Kozlowski 1992).

Manager behavior early in the socialization process has strong influence on newcomer learning. In addition, manager behavior impacts socialization outcomes of

performance, job satisfaction and organizational commitment (Bauer and Green 1998). Manager behavior indirectly influences performance but over time the impact becomes limited. However, the newcomer's need to perform and demonstrate personal abilities is constant (Bauer and Green 1998). Continuous support from managers is relevant even after organizational integration as well. Jokisaari and Nurmi (2009) discovered that the support provided by supervisors is important between 6-12 months after organizational entry. The perceived lack of support after these months resulted in decreases in job satisfaction, role clarity and lower increases in salary.

Supervisors and managers should invest time in facilitating the newcomer to the organization and provide opportunities for the newcomer to utilize their expertise. Newcomers should be introduced to multiple projects because this provides opportunities to build social networks in the organization and assists in the creation of an information base (Jokisaari and Nurmi 2009). This can be extremely valuable within the organization because the newcomer can utilize organizational resources efficiently to accomplish tasks which can build confidence in the newcomer impacting self-efficacy. In addition, informational networks that span across the organization increase the newcomer's ability to understand organizational structures (Morrison 2002). Newcomers who develop dense networks have increased mastery of their jobs and an increased understanding of role expectations (Morrison 2002). In addition, building a bigger picture of the organization facilitated by larger networks is important because it increases clarity in understanding the roles function in supporting other departments (Morrison 2002).

There have been relatively few studies on the role of mentoring within organizations (Saks and Gruman, 2012). Mentoring should be an important aspect of organizational entry because it can decrease anxiety and be a low threshold contact point for the newcomer to the organization unlike a direct supervisor or manager. Ostroff and Kozlowski (1993) findings suggest that mentors are an important contact point in organizational understanding due to the knowledge that the mentors have on organizational culture, politics, and history. Supervisors were not relied on for information at early socialization stages due to the perceived relationship between the supervisor and newcomer. However, this does not imply that supervisors do not take a mentoring role but often mentors are notable during information gathering when

compared with supervisors (Ostroff and Kozlowski 1993). Role models support socialization as well as they provide wisdom to newcomers about the organization which influences job performance (Asforth et al. 1997).

### **2.3 Organizational Socialization and the Relationship to Onboarding**

The terminology around organizational socialization is diverse and often can be somewhat confusing. In addition, some authors have grouped onboarding and socialization together and have implied that managers and human resource (HR) representatives use the term onboarding or induction instead of socialization or organizational socialization (Klein and Polin 2012). In this case, it is imperative to define these terms and highlight the differences that exist between these terms.

Organizational socialization is the process by which employees learn about and adapt to jobs, expectations, roles and culture while socialization is an individual psychological process that occurs when attempting to integrate to the new organization or role (Van Maanen and Schein 1979; Klein and Polin, 2012). Therefore, onboarding can facilitate organizational socialization by a set of practices, policies and procedures that are either formal and informal enacted by organizations to structure newcomer experiences (Klein and Polin 2012; Klein et al. 2015). Proactivity is also a difference when comparing organizational socialization and onboarding. Newcomers can be proactive and adapt to a new organization or setting while organizations can design onboarding programs to facilitate newcomer proactivity. However, the newcomer might not take full advantage of the program and thus, onboarding is often an organizational capability (Klein and Polin 2012). Proactive managers understand that employee onboarding can be improved by regulating the formal training and work experiences that newcomers go through during the organizational socialization process which has an impact on the outcomes for the organization as well as the newcomer (Saks et al. 2007).

Onboarding is also different to organizational socialization tactics (Van Maanen and Schein 1979; Jones, 1986). The tactics whether individualized or institutionalized comprise of three broad strategies or six dimensions (table 1 and table 2) in which newcomers are socialized. Although they are extremely valuable, this approach does

not constitute as a method by which organizations can assist in newcomer socialization (Klein and Polin 2012; Klein et al. 2015). However, onboarding activities can be delivered utilizing a mix of socialization tactics and newcomers may experience a combination of the different socialization tactics (Klein and Polin 2012).

Often employee onboarding is a program initiated by the organization with the purpose of quickly integrating newcomers to role within a specified time frame lasting from a few hours to some months. In most cases onboarding should last longer than anticipated and provide more information to the newcomer. Moreover, benchmarking other companies in the same industry can provide valuable feedback in improving the onboarding program (Cirllo and Kleiner 2003). Onboarding is often structured by HR departments or managers with the purpose of steering newcomer experiences and facilitating socialization. Therefore, to conclude utilizing Klein and Polin definition (2012 pg. 3) “onboarding refers to all formal and informal practices, programs, and policies enacted or engaged in by an organization or its agents to facilitate newcomer adjustment.” For the purpose of this thesis, newcomer adjustment is closely related with the newcomer’s socialization process because socialization has an impact on the outcome and adjustment of newcomers which is extremely individual. Finally, there is a lack of information and research with regards to onboarding in academic literature and information tends to stem from practitioner-oriented sources which does not provide information on the methods to achieve onboarding outcomes (Klein and Polin 2012).

### 2.3.1 Inform-Welcome-Guide (IWG) Framework

Klein and Polin (2012) indicate that there are a limited number of academic studies that focus on onboarding programs and onboarding activities even though organizations utilize onboarding or induction to socialize employees. However, the Inform-Welcome-Guide (IWG) framework has been utilized in some cases (Klein and Heuser 2008; Klein and Polin 2012).

The inform category is important in reducing ambiguity which addresses aspects that focus on improving role clarity. This can be done by orientation trainings (inform-training), providing materials and assistance to the employee (inform-resources), and

dialogue between employee, HR representative and manager (inform-communication). Within the category of inform-communications, the most helpful practice is to conduct a personal meeting with the manager (Klein et al. 2010 ref. Klein and Polin 2012). Any effort done by the organization to make resources available to the newcomer should help in newcomer adjustment (Klein and Polin 2012). Training is related to newcomer knowledge and skill acquisition which includes both informal and formal training and orientation activities done by organizations. Training programs should be linked to the organizational role and delivered properly in order to yield the best results (Klien et al. 2012 ref. Klein and Polin, 2012).

The welcome category is focused on orienting activities and include practices, programs and policies that introduce the employee to a new environment or setting. With this, the new employee can build valuable social networks within the organization since it facilitates social network building (Klein and Polin, 2012). The ability to build social networks within the organization assists in newcomer integration and organizational commitment which impacts organizational knowledge, task mastery and role clarity (Morrison 2002). In addition, welcoming activities should be planned strategic exchanges instead of informal ones (Rollag et al. 2005).

The guide category involves providing new employees a socialization agent that assist in the transition to the new environment. Four different agents have been suggested and include representatives from HR, coworkers, supervisors and mentors (Klein and Polin, 2012). Some studies have been done on the role of mentoring and socialization agents (Ostroff and Kozlowski 1993; Saks and Gruman 2012) but the impact of the mentor relationship within onboarding programs is somewhat unclear (Klein and Polin 2012). Thus, further research is required in evaluating the nature of relationships.

### 2.3.2 The IWG Framework in Practice

Following the inform-welcome-guide (IWG) framework (Klein and Heuser 2008), Klein et al. (2015) studied onboarding practices within organizations by investigating if, how, and when onboarding is occurring and discovered four interesting conclusions. This study is extremely valuable because it is unique to the onboarding process.

First, there is a discrepancy between the organizations implementing onboarding and the experience of onboarding reported by employees. Employees experience onboarding less often than organizations report utilizing onboarding (Klein et al. 2015). This could be based on a lack of communication between departments or structural problems in which managers are not implementing onboarding activities that have been designed (Klein et al. 2015).

Second, onboarding can utilize several different practices and the findings indicate that offering more practices rather than fewer further assists in the socialization process (Klein et al. 2015). Two practices which newcomers perceived as helpful were also the ones that were least often offered by organizations (Klein et al. 2015). The first practice would be to assign a mentor to the newcomer and the second, allowing the newcomer to shadow a fellow associate. In addition, a new employee video or a personalized welcome letter from a senior leader rated lower in perceived helpfulness. In order to maintain onboarding objectives organizations should proactively evaluate and update the content which is seen as helpful and eliminate those that do not yield desired results (Klein et al. 2015).

Third, how onboarding practices are offered or experienced also matters. In this case, newcomers found onboarding more helpful when it was required instead of encouraged (Klein et al. 2015). Furthermore, formally experiencing onboarding practices had a significant impact on the positive effects of socialization. Therefore, onboarding should consist of multiple practices from each IWG category because each category has a different purpose. However, onboarding can reach a point of diminishing returns and organizations must decide how many onboarding practices it can offer due to limited organizational resources (Klein et al. 2015). Companies should therefore attempt to strike a balance insufficient and sufficient resources employed and allocated for onboarding purposes.

Finally, onboarding should be directed and organized more formally because obligatory programs may be taken more seriously due to the nature of the onboarding atmosphere when compared with informal programs (Klein et al. 2015). The timing of onboarding activities is more complex issue and results indicate that it depends on the needs of the new employee. Academic and practitioner research suggests that



onboarding should be a process with a prescribed duration but as Klein et al (2015) study indicated, most onboarding activities occur on the first day. In this case, overloading newcomers might not be the most effective in facilitating socialization. Providing onboarding activities should move from basic information to more focused information to take advantage in the time between recruitment, hiring and start dates (Klein et al. 2015).

### 2.3.3 The Four C's of Onboarding

A final framework of developing onboarding relates to the Four C's developed by Bauer (2011) which constitute as a basis for developing onboarding programs. The Four C's of onboarding are explained in table 3.

Table 3. The Four C's of successful onboarding (adapted from Bauer 2011)

Compliance	Basic legal and policy related rules and regulations
Clarification	Understanding of job performance and expectations
Culture	Conceptualizes organizational norms (informal and formal)
Connection	Interpersonal relationships and information networks

The development of onboarding programs should take a user centric approach because it can complement human based competitive advantages which arise from correct hiring policies. For firms to sustain competitive advantages, resources must be valuable, rare, inimitable and non-substitutable. In addition, human resources can be a source of competitive advantage based on the skills, knowledge and capabilities they possess (Barney 1991; Coff and Kryscynski 2011). However, to sustain human based capital advantages, companies must be successful in attracting, retaining and motivating talent (Coff and Kryscynski 2011). In addition to the Four Cs, employees will go through short term adjustments to a role when entering an organization which organization should try to utilize when developing onboarding programs (table 4).

Table 4. Successful onboarding factor definitions (Bauer 2011)

Factor	Definition
Self-efficacy	Self-confidence in job performance
Role Clarity	Understanding of role and role expectations
Social Integration	Relationship building with colleagues and leaders
Knowledge of Culture	Understanding of company politics, goals, values, and language of company

There are two distinct types of onboarding which are informal and formal onboarding and companies must decide which onboarding process works best (Bauer 2011). Informal onboarding is a process by which employees learn about the organization and the job individually while a formal process is a coordinated effort done by the organization and assists employees in role adjustment and socialization. The two meta-analysis support an onboarding model that is more structured (Bauer et al. 2007; Saks et al. 2007).

Bauer (2011) further develops these concepts into a research-based model of onboarding (figure 8). Most importantly, successful onboarding is a coordinated activity pooling resources from different HRM functions in a seamless manner to support new employees.

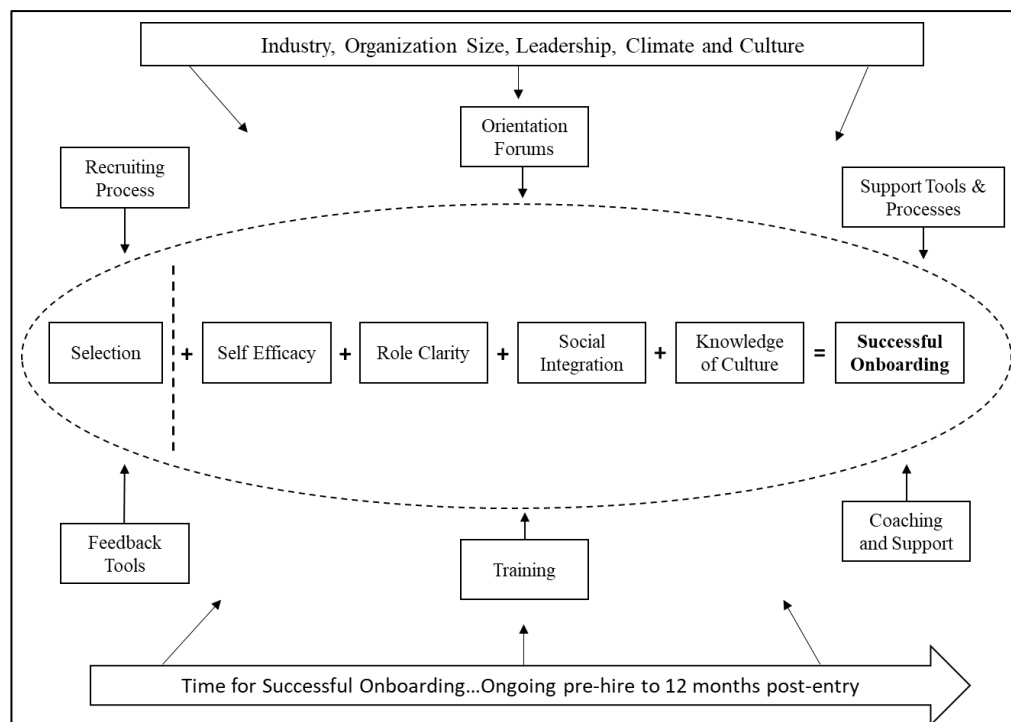


Figure 8. Research based model of onboarding (Bauer 2011)

Developing onboarding programs poses multiple different challenges to an organization. Often, the development of these programs and the socialization that occurs during onboarding can drain resources from different departments which should be contributing to the organizational mission. In addition, developing a single onboarding plan that suits the needs of different departments and roles might not be as feasible as a tailored plan following a similar structure across the organization which could be iterated and developed with relevant feedback (Britto et al. 2017). When new employees join a new environment, organizational insiders may feel threatened with the entry of a new employee during the socialization process. This organizational entry provides ample opportunity to evaluate personal skills and attitudes about the current organization. In addition, the participation of organizational insiders on the socialization process can either strengthen positive images of the employer or degrade images which is contingent on the successfulness of the process (Feldman 2012).

### 3 Sales Management

Sales management is a diverse field with academic research conducted regularly. The business environment is often shaped by different external factors and organizations must recognize the effects that customers, competitors, technology, legal aspects and ethics have on selling and sales management. In addition, internal forces that drive change need to be accounted for as well and include company strategy and performance challenges (Jones et al. 2005).

Sales management according to the American Marketing Association (2019) is the “planning, direction, and control of the personal selling activities of the business unit including recruiting, selecting, training, equipping, assigning, routing, supervising, paying and motivating as these tasks apply the sales force”. Onboarding and organizational socialization are often associated with training and equipping the sales force especially when newcomers enter the organization. Sales management is further analyzed into three distinct categories which are formulation, analysis, and evaluation and control of sales programs and performance (American Marketing Association – Dictionary 2019). Sales has shifted from a traditional one-on-one approach to relationship building that occurs across multiple organizational levels and the evolution of sales highlights the customer as the focal point of organizational activities (figure 9) (Moncrief and Marshall 2005).

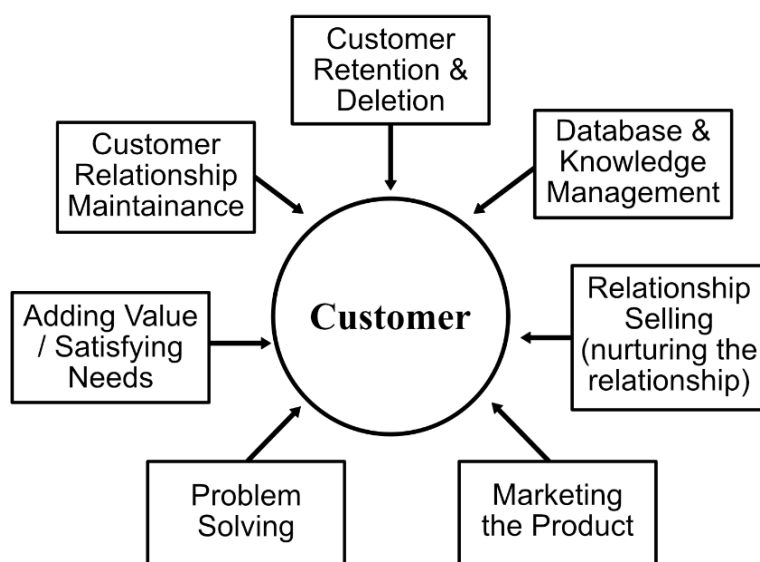


Figure 9. The evolved selling process (Moncrief and Marshall 2005)

Moncrief and Marshall (2005) further elaborate on the changes to the traditional approach to selling. Customer retention and deletion is an important aspect because organizations find that 80% of the firm's profits come from the largest 20% of customers also known as the 80:20 rule. In this case, resources are utilized to serve the significant customers better in which case the lifetime value of the customers should be considered. Prospecting occurs when the lifetime value of customers outweighs the costs and therefore, sales personnel have shifted focus to serving the best customers (Moncrief and Marshall 2005).

Knowledge of salespeople has also increased with the advent of new technologies especially sales force automation and customer relationship management software. This has made the selling organization more professional and knowledgeable with regards to their customers as history and information on customers is readily available (Moncrief and Marshall 2005). Nurturing the relationship is a team-based approach of the firm and the objective is to provide superior customer service relative to competitors by deciding suitable approaches best suited to serve individualistic customer needs (Moncrief and Marshall 2005).

Salespeople have also approached the marketing field as they are the key sources of information with regards to products. Sales participates in market segmentation, product development, market development and diversification while multichannel sales can be utilized to provide the customer with information with up to date information. (Moncrief and Marshall 2005).

Adding value and problem-solving concern solution selling and the salesperson attempts to find a win-win solution that suits the needs of the customer as well as the organization. Finally, customer relationship maintenance implies continued service with the customer and is a more business-building approach (Moncrief and Marshall 2005).

### **3.1 Sales Strategy and Performance**

The sales force is under constant pressure to perform better and develop customer relationships that yield results. Sales in business to business markets (B2B) is known

to evolve around account management and solution selling which has shifted away from the traditional order-taker perspective (Storabacka et al. 2009). In addition, value-based selling (VBS) has become an increasingly important topic in corporate strategies (Töytäri and Rajala 2015). Furthermore, Evans et al. (2012) indicate five key areas in which sales performance can be impacted by increasingly complex markets. First, customer relationship management is complex in which salespeople must be able to align buyer and seller resources to find an optimal solution. Second, client relationship management needs to be creative to maintain and secure profitable relationships. Third, buyer skepticisms and resistance has increased which yields a need for creative processes. Fourth, ethical considerations need to be matched when aligning buyer-customer relationships and finally, selling occurs in teams and individual motivation might misalign from team motivation which can impact sales performance (Evans et al. 2012).

### 3.1.1 Sales Strategy

Sales strategy is an indicator of sales performance and effective implementation can be a source for company success and performance. Even though sales strategy is important the topic of strategy orientation and implementation has been under researched. In addition, very little is known about the effective measures utilized to translate strategy to performance (Panagopoulos and Avalonitis 2010; Terho et al. 2015).

As described by Panagopoulos and Avalonitis (2010 p. 48) sales strategy is “the extent to which a firm engages in a set of activities and decisions regarding the allocation of scarce sales resources (i.e. people, selling effort, money) to manage customer relationships on the basis of the value of each customer for the firm.” Sales strategy contains four key dimensions which include customer segmentation, customer prioritization, developing relationship objectives and selling models, and utilizing multichannel sales (Panagopoulos and Avalonitis 2010).

Effective sales strategy increases both sales performance and company performance because organizations are better aligned to allocate resources across customers with proper segmentation. In addition, those companies who regularly update strategy

understand the customer base due to increased capabilities in crafting appropriate sales models such as key account structures (expensive models) and inside sales teams (inexpensive models). From the four constructs of sales strategy, customer segmentation was found to impact selling performance directly while prioritization and selling models had an indirect effect (Terho et al. 2015). Segmentation impacts both market and salesperson performance and organizations should attempt to build segmentation schemes based on customer data collected. In addition, target customer profiles should be developed to assist salespeople in anticipating customers' business needs. Prioritization also enables VBS behavior still the VBS approach is not sustainable across the whole customer portfolio based on the resources it requires. In addition, the selling model is an antecedent to customer orientation which can have an indirect impact on salesperson performance (Terho et al. 2015).

Sales strategy also influences sales force behavior and customer relationship management performance. Crafting sound sales strategies enables sales personnel to understand the direction the company is heading. When competition heightens and uncertainty increases, the sales force has a better understanding of corrective actions required to develop and support profitable customer relationships (Panagopoulos and Avalonitis 2010). Salespeople also require skills and capabilities in discovering and evaluating customer needs in an effective manner to find new opportunities and improve customer alignment. This can be done by focusing on skills that promote customer-oriented selling and designing appropriate selling models that have the highest returns to the organization. Therefore, salespeople must actively engage and cooperate with customers to find suitable synergies (Terho et al. 2017). However, implementing sales strategies in business markets can be extremely difficult because the impact on performance is indirect and depends on customer orientation and value-based selling efforts (Terho et al. 2015). In some cases, the implementation of sales strategy is more detrimental to success than the actual strategy itself (Sterling 2003; Panagopoulos and Avalonitis 2010).

### 3.1.2 Value-based Selling and Customer Orientation

Sales organizations are utilizing their personnel to manage customer relationships and technology has eradicated many mundane tasks required for successful customer

relationship management. Organizational success originates from effective sales strategies, sales force leadership and technological effectiveness. In addition, sales personnel are the link between the buyer and seller (customer and organization) where information flows actively (Ingram et al. 2002).

Corporate strategy intertwines marketing and sales strategy in which the sales function plays a practical role. Three clear constructs are mentioned by Ingram et al (2002) which include building a customer centric culture, developing a learning organization, and utilizing coaching as a developmental tool (Ingram 2002). Building a customer centric sales culture can be difficult within multinational corporations because culture may vary between norms, artefacts, language and behavior. Nonetheless, a customer centric sales culture is possible by building a model that fits best with the organization by examining shared values, norms, language and behavior. Strategy should be in place that identifies the needs of the customer to lead change (Ingram 2002).

Value-based selling (VBS) is a unique approach in business to business markets which places the customer at the focus of salesperson activities. In addition, creating customer value is important for any organization's future success in competitive markets (Töytäri and Rajala 2015). Value based selling encompasses three different dimensions which include understanding the customers business model, creating applicable value propositions, and communicating customer value. This is accomplished by identifying, communicating and verifying the value of the customers (Terho et al. 2012; Töytäri and Rajala 2015). Value based selling requires specific capabilities and requires engagement with the buying process. First, it is important to influence the perception of value and the potential value in the buyer and seller relationship, second to expand on the notion of value, and third, to commit to a shared vision of a solution (Rajala and Töytäri 2015). Value-based selling behavior have an impact on a number of different salesperson performance outcomes (Terho et al. 2012). Conversion rate should increase when the seller understands the customers' business needs and crafts compelling value-based arguments which influences the customers purchase decision. In addition, VBS behavior facilitates value co-creation and assists in customer business goal and performance target realization. When done effectively, satisfaction, loyalty and relationships are increased which reduces price sensitivity. In addition, value-based selling is a key performance indicator in business markets and



has an impact on salesperson performance (Terho et al. 2012; Terho et al. 2015). For successful VBS, salespeople need to understand the customer business model and relate the offering with the customers key performance indicators (Terho et al. 2012). This correlates with Terho et al. (2015) findings that developing different selling models should be accepted within the organization as there are several different sales methods. Selling models should be supported by sales directors because it influences customer orientation of the salesperson which is a prerequisite for successful value-based selling. In addition, value-based selling should not replace current sales methods but support them (Terho et al. 2012).

Within organizations, there seems to be a lack of training with regards to customer orientation and value-based selling. Organizations should attempt to transform selling methods towards a value-based approach by training their sales staff. Training should capture the three concepts of VBS; understanding customer business models, development of value propositions, and communicating customer value (Terho et al. 2015; Terho et al. 2012). Promoting sales people who possess these qualities should also assist in the transformation. This can also have an implication on the potential onboarding program as these constructs should be elaborated within early training.

### **3.2 Strategic Customer Relationship Management**

Customer relationship management (CRM) is an important aspect in the sales environment because often CRM is used to manage interactions between the company and the customers (Soltani et al. 2018). The successfulness of customer relationships are fundamental in any business where salespeople facilitate the relationship between the buyer and the seller. An abundance of customer information can be organized in a manner to develop and build competitive advantages based on successful customer relationships (Barney 1991, ref. Wang and Feng 2012; Srivastava et al. 2001). CRM has also been defined as customer management which attempts to build and enhance relationships with customers in order to build customer value and improve profitability (Payne 2006).

### 3.2.1 Customer Relationship Management Terminology and Process

CRM terminology is often inconsistent and there is a lack of clarity with regards to its domain and terms such as customer relationship marketing, customer management, enterprise relationship marketing and many others are used accordingly in different contexts. In many cases, the term CRM indicates an IT solution that manages a variety of customer data (Payne 2006). However, customer relationship management should be a strategic objective that incorporates IT solutions, corporate understanding of customer value and the solutions to manage customer relationships effectively. Payne and Frow (2005, pp. 168) further emphasize that “CRM is a holistic approach to managing customer relationships in order to create shareholder value” when defined strategically. The CRM continuum is found in figure 10.

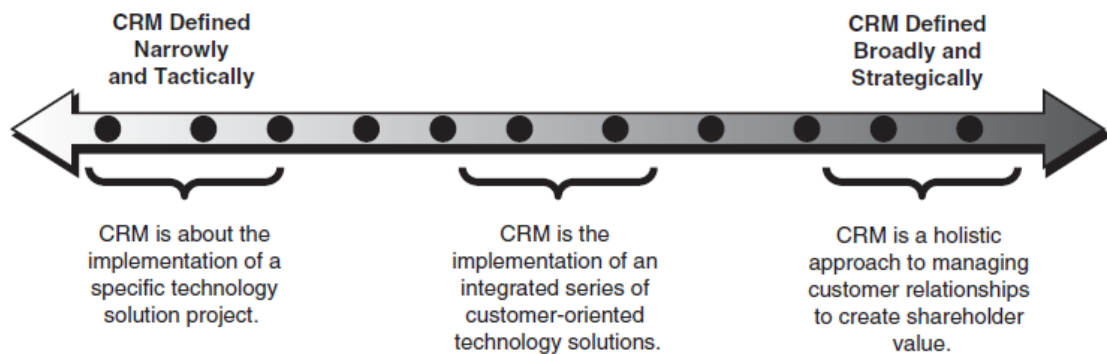


Figure 10. The CRM Continuum (Payne and Frow 2005)

Technology, organizational changes and relationship development have altered how companies interact with their customers and those who implement a variety of customer processes successfully benefit from increased loyalty and profitability (Chen and Popovich 2003). Customer relationship management is an integral part of any successful company because it increases customer and shareholder value by incorporating strategy development, value creation, multichannel integration, information management and performance assessment processes (Payne and Frow 2005). The success of CRM strategy is interrelated to business and customer strategy and requires a dual focus. This process is highlighted in figure 11 (Payne and Frow 2005).

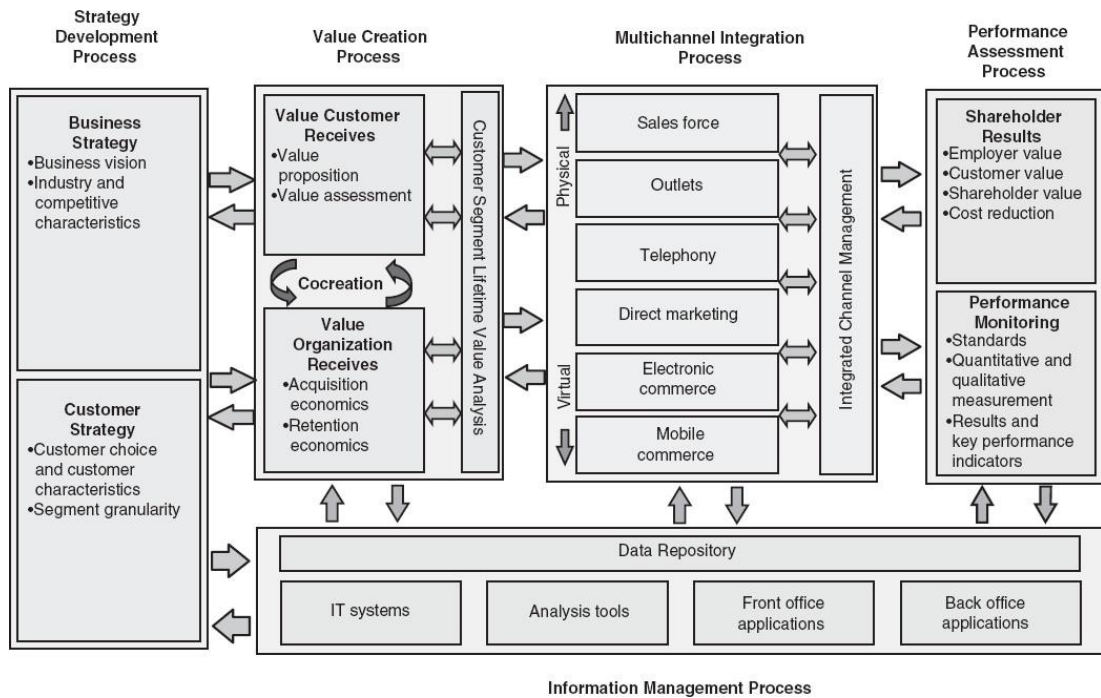


Figure 11. A conceptual framework for CRM strategy (Payne and Frow 2005)

Business strategy often drives customer strategy however, without clear business goals forming a customer strategy might be difficult (Payne and Frow 2005). Generally, customer strategy is steered by top management, the executive board and the CEO while customer strategy focuses on customer segmentation and analysis assisted by the marketing and IT departments (Payne and Frow 2005). Value creation can be a difficult task because sales organizations might not have the knowledge or tools required to craft value-based arguments (Töytäri et al. 2015) but Payne and Frow (2005) indicate three elements of the process that are determined by strategy formulation. First, value to the customer needs to be determined, second, value received should be analyzed and finally, value needs to be managed with co-creation and coproduction that enhances lifetime value of desired customers. The multichannel integration process focuses on the channels used which affect customer experiences and display a single view of the customer (Payne and Frow 2005). When customers utilize more than one channel a single unified view of the company should be present. The information management process is also highly important as it utilizes customer data and information on customer contact points to generate feedback from customers that assist in creating marketing responses (Payne and Frow 2005). Finally, the strategic aims of CRM should be monitored by the performance assessment process which involves shareholder results and performance monitoring (Payne and Frow

2005). However, Ata and Toker (2012) discovered that the implementation of CRM practices does not necessarily constitute to improvements in financial performance but increases in customer satisfaction. In light of this, customer satisfaction should lead to improvements in financial performance as the effects may be delayed once relationships reach a desired level where value captured for both the buyer and the seller.

### 3.2.2 The Co-creation of Value

Service-dominant logic highlights the importance of having a customer-oriented focus in developing value creation through exchanges (Vargo and Lusch 2004). In a service-centered view, the customer is the coproducer of value and the role of the organization is the ability to tailor offerings that fit the needs of customer. Moreover, the role of the company is to provide tangible value propositions to the customer that offer a competitive advantage in which employees are in the middle of value exchange process. The employees of the organization support the needs of customers in multiple ways (Vargo and Lusch 2004).

Organizations should develop value propositions with processes and resources that support the co-creation of value where the relationships built between the supplier and customer are dynamic and longitudinal (Vargo and Lusch 2004; Payne et al. 2008). These processes can be further classified to the customer-value creating process, the supplier value-creating process, and the encounter process (Payne et al. 2008). The customer value process in the business-to-business context are the methods which the customer utilizes to manage relationships with the supplier while the supplier value-creating process are the methods which suppliers manage business relationships with stakeholders and customers. The encounter process relates to the opportunities and dynamic interaction that occurs where co-creation of value is possible (Payne et al. 2008). This framework is indicated in Figure 12. Future opportunities with the customer are influenced by the relationship built based on the experience the customer has with the supplier where the customer learns about the potential value provided. Organizational learning on the other hand is the ability of suppliers to understand customer information which impacts future opportunities based on redevelopment of

the relationship experience and potential avenues for value co-creation (Payne et al. 2008).

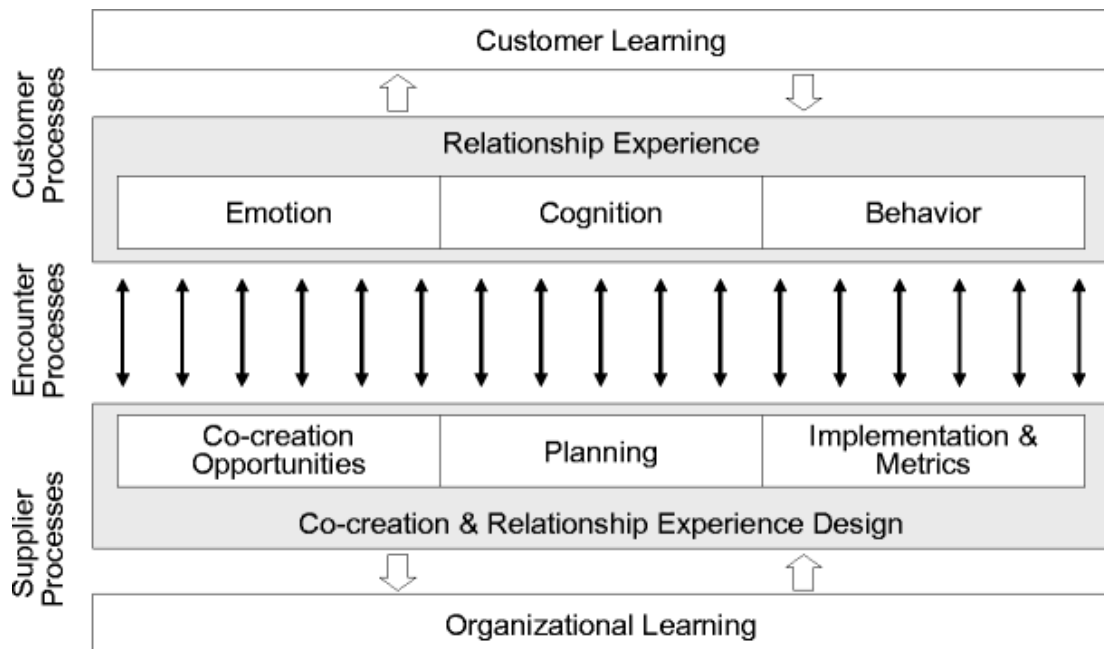


Figure 12. Value co-creation framework (Payne et al. 2008)

The value creation process both from the customer and supplier side can be complex as it occurs both across and within the customer and supplier. In addition, goods and services must be developed with both tangible and intangible qualities in mind and customers should be engaged in the redevelopment of products (Payne et al. 2008). Involving the customer in the prototyping phase is an extremely valuable feedback mechanism because it involves the customer in developing the product and hence the value together. This requires a more in depth look at the outlook of customer relationships (Payne et al. 2008).

### 3.2.3 Organizational Culture in Customer Relationship Management Strategies

Organizational culture plays a key role in CRM strategies. Often, superior customer relating capabilities stem from organizational culture and the promotion of customer relationship building. Culture is an important aspect as it is the method in which individuals address problems, build relationships and fulfil their organizational roles (Dubinsky et al. 2003 reference by Borg and Young 2014). Management plays an important role in the implantation of sales strategy and culture. Terho et al. (2017)

highlights two key principles. First, learning-oriented salespeople are required because they contain the motivation to learn, adapt, and perform challenging tasks. Second, recruitment of capable personnel is not enough, and management should invest resources into assessment tools at the organizational level.

Companies must continuously monitor and develop CRM capabilities to improve customer proactiveness and implement technology effectively (Wang and Feng 2012). Customer data within CRM software is integral when considering customer relationship management though current research has not concentrated on customer data and customer relationship management in light of businesses moving from product selling to service selling (Saarijärvi et al. 2013). Data can be utilized in three methods (Saarijärvi et al. 2013). First, customer data can be utilized in a more effective way to better serve the customer and not only utilized inside the company. This will require a shift in thinking from many organizations especially in the B2B context which predominantly focusing selling products. Second, customer data provides new avenues to develop customer relationships through innovative methods. Data on customer patterns and consumption preferences provided to the customer may support relationship building at a more advanced level. Finally, data needs to be managed and handled accordingly which has also received increased attention with the introduction of General Data Protection Regulation (GDPR) policies. Data should be translated in a way that supports customer resource integration (Saarijärvi et al. 2013). Customer relationship management is an extension of customer orientation in which companies must address the specific needs of each individual customer. Implementation of new CRM applications to increase customer satisfaction is also difficult. The organization must concentrate on customer-centric management and adopting a suitable CRM system

#### 3.2.4 Customer Data

Customer data collected by a variety of different means is the basis for customer knowledge that can be utilized by salespeople to increase sales efforts. Davenport et al. (2011) indicate that customer knowledge tends to be fragmented and interactions across multiple platforms might not yield additional insights about customers. Human data should be mixed with transactional data that is easily collected and manipulated

in order to understand the customer better. In addition, with multichannel customer information made possible with the rise of technology, as much data as possible should be integrated to generate successful customer profiles and develop human knowledge about the customer. (Davenport, et al. 2011). The switch to a customer-oriented organization also requires a new breed of salespeople that should be supported and developed by Human Resources (HR). Most importantly, firms must address the issue that some employees do not possess the appropriate skills required from a customer focused company which has a negative impact on organizational changes (Homburg et al. 2000). Customer knowledge should be used in an effective manner especially in account management because strategic actions are based on the collected and analyzed data. Salojärvi et al. (2010) further indicate that customer data has a potential for multiple other different development items such as analyze buying behavior, evaluate new opportunities, and develop new products and services. Furthermore, with an aging workforce, it is important to capture knowledge within the organization by managing customer data appropriately.

### **3.3 Sales Technology**

A consensus exists that automation of sales technologies will enhance sales performance which should result in increased profit for companies (Homburg et al. 2010). Furthermore, with increased competition, executives are attempting to consider the sales force as a driver for enterprise value when price, product or brand is not enough (Holden 2016). Sales Force Automation (SFA) tools include personal productivity aids, personal management tools, functional tools, and process aids which are all interconnected and integrated (Jelinek et al. 2014).

Employees within the sales organization are the keepers of the knowledge and have insights to market trends and developments in B2B environments where information can be complex and difficult to analyze. Sales technology, especially sales force automation should assist in the processing of data (Hunter and Panagopoulos 2015). One method to achieve data analysis and processing is the harmonization of SFA technologies. However, harmonization requires vast commitment of financial and human resources coupled with the high risk of many large-scale implementation projects. It has been noted that as many as 55 % - 75 % of SFA projects fail due to

rejection by the sales force (Homburg et al. 2010). In order to mitigate the risks, organizations must make strong financial commitments to areas such as software, hardware, and training with additional resources taken from the organization in implementation and facilitation of new technologies (Mathieu et al. 2007).

### 3.3.1 Adoption of Sales Technology

When new sales technology is introduced it is important to facilitate adoption because it can impact company and salesperson performance. Mathieu et al. (2007 pg. 528) describe information technology within the salesperson context as “the degree to which salespeople integrate different information technology tools into their sales activities.” However, salespeople are known to have difficulties in adopting new tools and possess negative self-efficacy with new technologies (Mathieu et al. 2007). Management must consider organizational culture and the demographics of the organization when implementing technology to organizations (Pearson et al. 2002). Rejection can be decreased by empowering the salespeople, but rejection might still occur if technology is not implemented by individuals in daily tasks (Mathieu et al. 2009). Managers and leaders can also increase adoption by being supportive of organizational change initiatives caused by technology (Mathieu et al. 2009; Homburg et al. 2010; Rapp et al. 2011). In addition, design should attempt to maximize relationship building capabilities and improve the customer interactions that salespeople have with their respective customers (Park et al. 2010).

With recent advances in technology such as cloud based and social technology, companies are further developing their sales technology portfolios. However, technological change also alters the salesperson’s attitudinal disposition which firms must realize (Hunter and Panagopoulos 2015). In addition, when sales technology does not get infused with everyday tasks and processes, returns might be lower than expected. Based on commitment to technological change, Hunter and Panagopoulos (2015) study indicated that a sense of obligation to adapt and embrace change to new technology positively influenced adoption. Furthermore, infusing technology to daily tasks increases sales performance and influences customer-oriented selling positively. On the other hand, sales processes that are too rigorous with the implementation of new technology may negatively impact customer-oriented selling (Hunter and



Panagopoulos 2015). Finally, training has an impact on sales technology adoption as well. Early adopters of new technology possess a growth and learning mindset, but initial and continuous training is required to integrate sales technology to tasks (Jelinek et al. 2006).

### 3.3.2 Management Support for Sales Technologies

Top management and managerial commitment are pivotal in influencing the success of SFA technology implementation (Homburg et al. 2010). Managers should also attempt to be thought leaders of new technology by promoting the key performance improvements as these are often projected down the organization and observed by employees (Homburg et al. 2010). Top management also plays a vital role in SFA technology adoption and as discovered by Cascio et al. (2010), the highest levels of commitment to SFA resulted from top management alignment to technology which cannot be compensated by line manager or supervisor commitment. To increase adoption of technology within the sales organization, top management should have two objectives (Cascio et al. 2010). Firstly, upper management should internally communicate the support, commitment, and involvement of technology in the implementation process and secondly, investigate salesperson perception of alignment (Cascio et al. 2010).

Sales force automation influences customer relationship quality and performance (Park et al. 2010). SFA and CRM should be utilized in such a manner that enhances relationships between the customer and the firm via personalized marketing and service using employee judgement as a guide for interactions. Rapp et al. (2011) further indicate that marketing information should be processed by the sales force and a learning orientation culture should be in place which is supported by managers. Learning should be facilitated by information gathered from the market within the sales organization which support customer interaction building and improves relationships quality (Park et al. 2010). Furthermore, SFA design should attempt to maximize relationship building capabilities and improve the customer interactions that salespeople have with their respective customers (Park et al. 2010). When considering the aspect of onboarding, it is important that knowledge is shared between the senior and junior account managers because junior sales personnel do not have experience in

market information processing that senior colleagues do. Mentoring programs or formal training which could be potential solutions (Park et al. 2010; Mariadoss et al. 2014).

## **4 Research Design and Methodology**

As this is a commissioned thesis, a single case study method will be utilized. This should provide ample opportunities to explore and describe the phenomena occurring within the organization and to discover the perceptions of successful onboarding program. The limitation with this research is that it does not encompass multiple case studies but given the scope of the thesis, a single case study is feasible. A single case study can be utilized when it meets one of five rationales: a critical case, extreme/unique case, a representative/typical case, revelatory case, and longitudinal case (Yin 2003). For the researcher, it is to demonstrate to the audience the uniqueness of the case which justifies the research method and approach (Eriksson and Kovalainen 2008).

Case studies are an overlooked tool in social sciences and are utilized in several different situations. Case studies contribute to knowledge because it is related to individual, group, organizational, social and political related phenomena and are utilized to understand the exact phenomena occurring within the context. Within the business context, the case study method is effective in investigating organizational and managerial processes which in this case is to investigate the role of onboarding within the sales context (Yin 2003). Case study research also provides the researcher insight into the environment because the researcher is embedded within it and experiences can be reported in a narrative style (Eriksson and Kovalainen 2008). Generally, case studies tend to take an explanatory or exploratory research approach when the boundaries between different phenomenon are not clear (Saunders et al. 2007; Yin 2003). In intensive case study research, the researcher constructs the case and analyses the different perspectives, experiences and interactions that occur within the context of the people involved in the study (Eriksson and Kovalainen, 2008). Finally, contextual conditions will be analyzed and are therefore important to the case (Yin 2003).

## 4.1 Data Collection

The data was collected by interviewing key sales personnel within the sales organization who held various positions. Interviewing can be done in three different ways (structured interview, semi-structured interviews or unstructured interviews) and for the purpose of this case study, semi-structured interview method was utilized in order to understand relationships between the different themes identified in the research framework (Saunders et al. 2007). This technique also provides the researcher with opportunities to probe into questions that are of significance. Furthermore, semi-structured interviews offer the researcher the possibility to further delve into meanings that add significance and depth to the research phenomena occurring within the organizational context (Saunders et al. 2007). A list of interview questions is found in Annex 1. Yin (2003) indicates that the interviewer should follow two objectives, ask questions in an unbiased manner and use own line of inquiry. In addition, in semi-structured interviews it is important to ask questions that are open-ended in the form of “how” statements to gather data (Yin 2003). The flexibility of semi-structured interviews is one of the methods strongest assets because the researcher can make analysis and judgement-based decisions on the relevance of data collected. The process of data analysis occurs during the interviews and is a lived experience based on the iterative development of ideas (Gibson and Brown 2009). In addition, examination of interviews should take place as soon as possible as other topical issues can then be explored in different interviews. The analysis occurs simultaneously in accordance with interviews (Gibson and Brown 2009).

The interviews were carried out face-to-face (F2F) at the company headquarters or over business communication software (Skype for Business) during February-April 2019. Interviews were recorded and field notes were taken during the interview process. All interviewees were given the semi-structured list of questions beforehand and were affirmed that interviews are conducted anonymously. In addition, sample size includes different positions from regions these were grouped accordingly to A and B. In the A category, the person holds a managerial position and has people directly reporting to them while the B category is in a sales role and reports to a manager. The list of interviews, categorizations and dates of interviews are noted in table 5.

Table 5. List of Interviews

Date	Categorization	Region	Method
21.02.2019	B1	EMEA	Skype
25.02.2019	B2	EMEA	Skype
26.02.2019	B3	EMEA	Skype
26.02.2019	B4	EMEA	Skype
27.02.2019	B5	EMEA	F2F
28.02.2019	B6	APAC	Skype
05.03.2019	B7	APAC	Skype
21.03.2019	B8	North America	Skype
22.03.2019	B9	EMEA	Skype
26.03.2019	B10	North America	Skype
03.04.2019	A1	EMEA	F2F
04.04.2019	A2	EMEA	F2F
08.04.2019	B11	North America	Skype

## 4.2 Data Analysis

Willig (2014) argues that qualitative research analysis concentrates on making sense about people's experiences, thoughts, feelings and social practices and it is essential for research to make connections between data to increase understanding. For the case of qualitative research, researchers must attempt to answer question of "What does this mean?" and understand the whole context of the data gathered in order to provide a deeper understanding of phenomena (Willig 2014). Meyers (2009) further elaborates on the analysis of data. Data should be transformed in a meaningful way to come up with insights and includes asking questions such as: What is the meaning of my data? What are the main themes in my data? How does my data contribute to the field of knowledge? (Meyers 2009 p. 166).

The interviews were transcribed using an online platform (otranscribe.com) to analyze data accordingly. Thematic analysis was utilized to process and analyze data according to commonalities, relationships and differences between the data set (Gibson and Brown 2009). In addition, the thematic analysis was supported with categorization

analysis by means of pattern matching and explanation building in order to understand the relationships and connections within the data sample (Yin 2003; Maxwell and Chimiel 2014). All interviews were transcribed carefully in order to understand and analyze the text accordingly and stored to build a database. The sample size is large (13 interviews) and consists of managers and sales representatives from three geographically different regions which provides an in-depth view to the particular phenomena. In addition, interviewees were notified beforehand about the interview and their role. Anonymity was guaranteed to the interview participants and data collected was coded accordingly.

### **4.3 Validity and Reliability**

Yin (2003) mentions four different methods for judging validity in case study research. These are construct validity, internal validity, external validity and reliability. Construct validity is the process of establishing correct operational measures and requires two distinct steps. First, selecting the changes being studied and second, demonstrate that there is a change in the measures studied. In addition, construct validity can be increased by defining subjective assumptions and judgements during the design and data collection phase due to close contact with organizations and the people being studied (Reige 2003). For the purpose of this thesis, the changes studied are found within the research framework.

Internal validity is a concern in this case study as this study takes an exploratory research approach. Internal validity can be increased with analytic techniques (pattern matching, explanation building, addressing rival models and using logic models) which were utilized within this case study (Yin 2003; Reige 2003). External validity then relates to the generalizability of study findings and in case studies, focuses on analytical generalizations. In this case, findings should be replicated and applied outside the research context (Yin 2003). Additionally, external validity can be increased by researching the topic thoroughly and comparing existing literature to define an appropriate scope (Reige 2003). Finally, the researcher must address reliability which is done by minimizing errors and biases within the study (Yin 2003). The researcher can minimize this risk by making steps as operational as possible and considering an outside view in to the study. In addition, the researcher can utilize a

case study protocol or developing a case study database (Yin 2003). Reliability was maintained as theories and ideas were researched in depth, compatibility of research issues and study design was assured, observations and actions were recorded and transcribed, and similar findings were collected into themes (Reige 2003). As a rule, researchers must ensure the same study can be replicated and results would match. Finally, the research is inductive and builds theory instead of testing theory through analytical generalizations (Reige 2003).

## 5 Findings

The findings are separated into different themes and evaluate the impact these themes have on an onboarding program. The findings are used to indicate factors that influence the research framework.

### 5.1 Knowledge Factors Influencing Organizational Socialization

Organizational socialization plays an important role in integrating newcomers to the organization and organizations should develop onboarding programs that assimilate newcomers to their roles as quickly as possible. Previous knowledge from either the industry or competitive environment appears to accelerate the onboarding and organizational socialization process.

#### 5.1.1 Previous Industry Knowledge and Organizational Socialization

The results indicate that those who have previous industry knowledge are more likely to integrate successfully to the sales role because it assists in the ability to interact with customers and with the potential new team.

*“I have 11 years of experience in the packaging industry. Previously I worked for [a company] who is a leader in packaging in Europe and I am trying to use this experience to support my customer with light-weighting projects and with some innovative ideas.”*

(Interview B1)

*“We didn't entertain onboarding as much because I was already currently selling board so they did not have to spend a lot of detailed time on this knowing that I had worked for a recycled mill, a SBS domestic mill, converting facilities and plus selling your board [as an agent].”*

(Interview B11)

Industry knowledge does not necessarily originate from the paperboard and packaging industry, but the comparability of industries further assists understanding information which has an influence on organizational socialization.



*“Previously I was working for a Japanese trading company named [company name]. We were trading pulp and that is where I got most of the market information and sales training for this job. I spent about four and a half years selling [a company’s] pulp in South-East Asia region so in terms of the skills needed for selling paperboard, they are quite similar because the products are also quite similar.”*

(Interview B6)

Industry knowledge assists during customers interactions because the newcomer has the capability to utilize previous experience in coping with customer expectations.

*“I am more focused in [particular] segment which means selling raw material paperboard to the converters. Basically, most of the customers that I have are my old competitors in the region and this is quite interesting to me but my network and my experience is there so it is quite easy for me to penetrate into the network and discuss the expectations from the converters point of view.”*

(Interview B7)

*“I would say that I did integrate well but it is because I have quite a good background experience selling pulp so selling paperboard wasn't a very huge step. It was more refining certain differences between selling pulp and paperboard so I would say that the transition was really good for me. I think I was able to start selling in like three months by myself.”*

(Interview B6)

For those who do not have previous experience within the forest industry, the onboarding process is accentuated due to the technical knowledge the sales manager should possess. The onboarding program should be developed as a long-term objective of introducing the newcomer to the organization because the newcomer could feel perplexed with information overload. Previous industry knowledge influences self-efficacy and role clarity which assists in the socialization process. In addition, technical knowledge impacts integration because the newcomer understands the working environment entered.

*“I had an opportunity to observe the onboarding of our colleague because we here in [country] employed a sales [person] last year and I think onboarding was maybe a bit too short. ... [person] was from outside the business, so it was difficult to understand the market and build a relationship with the team and with the customers.”*

(Interview B4)

### 5.1.2 Competitive Environment Knowledge Impact on Organizational Socialization

When onboarding candidates to a sales role, information with regards to the competitive environment and market landscape should be introduced. This provides the newcomer with the opportunity to understand the existing market situation within the industry and understand the competitive environment in detail which is required when facing customers. Third party tools can be utilized to build an understanding of the market situation which should be introduced to the newcomer during entry. For those who enter from a different industry, market information plays a significant role in the onboarding process.

*“I would say a good onboarding process, first they need to understand the market through third party information, and then the second thing is they need to understand how specifically our company is working to sell our paperboard.”*

(Interview B6)

Market knowledge can be formed from different sources such as visiting customers, industry conferences and business intelligence. Business intelligence provides information on a fundamental level which is reinforced by being active in the market by visiting customers. However, it is imperative for the newcomer to understand key market information and trends before entering customers and this capability is often developed with experience. Competitor behavior and customer end uses are other important factors that should be highlighted. An active salesperson also understands that detailed information is uncovered by engaging actively with customers.

*“What is crucial is the understanding of the market and the market knowledge so the trends that we have on the market, where the market is going and the influence of economical trends. Also, you need to know competitor behavior and end uses that customers are targeting. So, the market knowledge is crucial and that knowledge we get when we visit customers and participate in conferences, fairs, and so it is crucial to be in the market. This is something you cannot teach to somebody when he is getting into the organization.”*

(Interview B4)

*“The newcomer in sales must understand how the packaging world works, how the printing world works or how the converting world works and that is a good starting point but be an active salesperson. The activity level must be high and*

*then the ability to learn new things. [...] Activities as in the salesperson is interested in visiting customers.”*

(Interview A2)

Market segmentation forms clarity to the newcomer but requires information about the competitive environment. Market and customer knowledge assist the newcomer in knowledge building about the industry and has an impact on personal strategy formulation. To understand the competitive environment, the newcomer should understand the targets and budget levels the company is striving for when formulating a customer strategy.

*“For a newcomer when you join the company and you do not know about your customers... I will tell him please understand the market, what is the market trend, what are our existing sales to this country, what are the potential customer in this country, and what is the budget target. Then what are the competitors, what are the price that our competitor is selling, and then what is our SWOT analysis to this country. They need to follow all of these and build up his knowledge. Then through this they will be able to plan personal strategy.”*

(Interview B7)

*“Business intelligence so daily set of news and analysis is also very helpful because when you start in the organization you do not have the exact market knowledge but when you meet customers you can share the knowledge that you get from this analysis about the trends and about the targets. Then you share that information then you get information so that it is a process.”*

(Interview B4)

Knowledge about customer behavior should also be transferred to the newcomer. This assists in customer categorization and segmentation.

*“So [the newcomer] sees what customer is a regular customer, which customer is a spot customer, and this is something that should have been passed to the newcomer. If a customer is really concentrated on the cheapest products, the customer can take degraded quality. There are different kinds of customer and we need them all because the market changes and we should keep contact with all of them even though sometimes we do not have anything to sell to them because we never know when we need them so we should treat customer right in the right way.”*

(Interview B4)

## 5.2 Internal Organizational Factors and Onboarding Development

There are several organizational factors that should be considered when developing onboarding programs that facilitate effective socialization. These should be standardized across the organization with changes being made depending on the role the newcomer is taking.

### 5.2.1 Standardized Content and Structure of Onboarding

The current onboarding process has been relatively unstructured and often expedited by the team that requires new resources to manage business accordingly. The structure has mostly consisted of a personal belief on the requirements that the newcomer should understand and undergo during onboarding. However, for onboarding to be successful the process should clearly identify the required steps and material the newcomer should experience and understand which should be standardized.

*“I haven't hired anybody since 2015 so it has been a while. What I can say is that we didn't have any specific guidelines in order to welcome newcomers into the company. We did what we thought was the best. I could not say that there was like a certain process that needs to be respected. Maybe things have changes since. I do not know, I couldn't say.”*

(Interview B3)

*“Definitely it is something that is followed by everybody. It is something that clearly describes what are the steps which probably do not exist at the moment. It is quite random as in who handles it and in what way.”*

(Interview B5)

The structure of onboarding has been done on an informal level which does not always contain all the requirements for integrating the newcomer to the organization. However, a supportive environment assists in newcomer expectation management based on the willingness of people to share knowledge, experiences and provide feedback. With an informal process support from colleagues assists in integration and influences knowledge of culture.

*“From what I observed there is no systematic way to do it but the people and the personnel here are very supportive. The atmosphere in the company is very*

*good because people are willing to share their experiences and to share their knowledge. In the first months there was some informal planning that this week I am going to share with you the knowledge and technical information. Next week we had hands-on experience with some customer reports and then after customer visits people will teach you how to do the reports and memos. From there I learnt step by step.”*

(Interview B7)

Information about the company, the strategy, goals and mission, and organization structure should be introduced to the newcomer and impacts role clarity and knowledge of culture.

*“Well for sure the newcomer should learn about the company. The company strategy, goals, mission, vision, the organization structure, and who the person should turn to when he has some questions and issues.”*

(Interview B4)

*“Well I think a general company overview, expectations, company culture, all of our sales and marketing points that we try to get across to the market as far as what differentiates us. I think a company overview is important for everybody so that they understand who they are working for and what our goals are.”*

(Interview B8)

*“I think knowledge of culture assists in integration because from the beginning it was clearly set up how we work, what are our mission, what is our culture, what we cannot do. It was clearly told.”*

(Interview B1)

A predetermined onboarding structure assists in guiding the newcomer through different departments of the organization. If onboarding is strategically planned, it should reduce anxiety and stress while also increasing role clarity and knowledge of culture. As salespeople are the facilitators of information between the customer and the organization, they should understand the organizational operating model as well as the nuances of other departments. In addition, this is an opportunity to build social networks within the organization.

*“On the first day there should be concrete planning to be done and to be presented to the newcomer. Every day there is something to do which is written and mentioned somewhere which can be followed. It is not only the HR in charge but all the different parties, like sales manager, IT people, customer service, production, and communications. All the different parties should be*

*part of this planning during a concrete period and just that the newcomers feels like they are well integrated and well appreciated.”*

(Interview B9)

*“I got support if something was missing. I was informed who should I contact so there was no time where I was sitting without doing anything. I was busy all the time. I was involved in the topics, so it was really good starting time for me.”*

(Interview B1)

In addition, understanding how the organization operates internally also influences self-efficacy and social integration.

*“In my sales point of view the most important thing is to know how to get to the key people internally. I need to understand how different departments work and how I should cooperate with them because the difficulty now is that I use trial and error every day.”*

(Interview B7)

*“It is very important to understand the product, the expectations, the strategies, and building that relationship with customer service, logistics and supply chain and understand all those components because if you do not understand all of those components you are not even going to be successful.”*

(Interview B11)

Consideration should also be given with regards to the content which could be categorized by assimilating strengths of the candidate while also improving potential weaknesses. This requires an understanding of the newcomer’s skills and development areas which are communicated by the human resources department.

*“A modular approach I think to onboarding as far as almost like doing an assessment of the candidate or the new employee and then tailor the training to get them up to speed with the company as fast as possible.”*

(Interview B10)

*“Each person should be checked in the what [the person] knows and what [the person] is still missing. So all the elements which are missing in the knowledge [the person] should get training on.”*

(Interview B1)

The content-based approach would provide detailed and structured information to the newcomer about the important aspects of the organization such as operating model, targets, departmental information, and possibly indicate areas the newcomer should get trained on which could be indicated to human resources. Training can consist of different aspects that are important to the business ranging from increasing product and segment knowledge, IT tool and software knowledge and even sustainability related matters.

*“They come here [to headquarters] and we go through our operating model, CRM training, boardmaking training and it continues from there.”*

(Interview A1)

*“The products, the company, the culture, and the expectations. Boardmaking class was very important because [in Americas] for example, we are not the dominant player like in Europe let's say as far as our board grades. So product knowledge and understanding is a huge part of that. The company overview is the macro of things and then drilling that down to the product knowledge and build a knowledge base and then tailoring some of the things as far as our systems, our CRM whatever it might be kind of based on peoples experience levels.”*

(Interview B10)

However, in many cases there is a tendency to leave newcomers alone after a short period of time with their new role. Therefore, the social networks built early during socialization are valuable and support onboarding.

*“I think [the person] was left alone because [person] worked like maybe not even half a year and left. Could not find [themselves] in the organization.”*

(Interview B4)

*“In some ways for the admin regarding sales internally [person] found most of the answers in the office but then when it was something more empiric, [person] had to look for the correct person to ask. This is why after six months [person] was quite depressed and had a very difficult time.”*

(Interview B3)

Internal changes that occur can influence the newcomer in negative ways because the social network built which assists in socialization also is affected.

*“The problem was that [newcomer] moved from one person who hired her to a boss that [newcomer] had never met before. It was quite messy because*

*[newcomer] had been launched in our company. Of course [newcomer] visited mills and so on but did not get a proper welcome in my opinion. Not very warm, not very nice, and [newcomer] had to do a lot by [themselves] to find answers to questions regarding how we were functioning”*

(Interview B3)

In addition, a unified structure of onboarding provides a framework that can be utilized across different regions which provides a unified view of the organization. Finally, the structure should provide opportunities engage the organization and impacts self-efficacy positively.

*“I think it is a HR, human resources effort because I understand that Metsä operates the sales office differently compared to what I am used to. [...] I cannot ask things day to day, I need to send emails to Hong Kong or I need to ask my Finnish colleagues, so this part is different. I mean I am not sure because if we have a framework across all the sales offices then maybe we can adopt this methodology or this kind of HR orientation program. Same language to different people and as long as there is a newcomer then we use the same tools to train them. It will be more beneficial.”*

(Interview B7)

*“In this case we should write some methods. It is all depending on everybody's sensibility. Some people are more sensitive than others so they might need more explanation, or more time, or more support because they are not so self-confident entering such a big company. Yes, there should be some methods written in black and white in my opinion like a skeleton for the basis of how to welcome the people.*

(Interview B3)

### 5.2.2 Duration of Onboarding in Information Acquisition and Role Management

The onboarding program should be spread over time in order to give the newcomer time to comprehend and understand all the requirements to integrate seamlessly to the organization. Training facilitates the onboarding process and assists in the integration to the company but can be excessive if done rapidly. This could potentially lead to negative outcomes such as increased anxiety and stress for the newcomer which may lead to turnover.

*“When you come from totally different background worked in totally different organizations it can be quite a lot for the beginning.”*

(Interview B4)



*“It is actually quite interesting because it should be a long-term project but for me it was a short-term one. I had quite a lot of training in the first weeks which is good because you need to understand all the business processes, all the people inside the company, all the customers, all the supplying models and not to mention of course all the products and the technical aspects of the products. But in the first couple of weeks you get a lot of training and it is a lot on your plate because especially for me as I was new in the board industry, it was a lot to cope with in the first weeks.”*

(Interview B2)

*“You do not want to overwhelm people because I think reflection, digestion and those kinds of things are important so that you can assimilate the information that you've got.”*

(Interview B8)

In addition, opportunities to review material should be provided in case aspects of the organization or the role are unclear.

*“The fundamental level was very quick and then after I went to Husum for a visit. It was about a month and then it was over. What was missing was a refresher as there was a huge amount of information given at one time.”*

(Interview A2)

Onboarding facilitates understanding of organizational norms and influences the ability to perform. However, the learning process can be individualistic and therefore, there is no clear timeframe and content which is optimal. The results indicate a timeframe between three to six months should be utilized.

*“What I think could be improved is that the induction plan is quite good but it should not be spread over a couple of weeks but a few months.”*

(Interview B2)

*“Depends on the person and previous experience. I would say three to six months is appropriate and depends on the person. I think three months should be minimum to let the person collect experience and all the knowledge which [they] need.”*

(Interview B1)

*“I mean it would be on a person to person basis, but I think to make people more comfortable and not be singled out your first year you should be in training. I do not think there is anything bad about that. Get trained on your first 90 days because that is your probationary period and then they let you loose but they monitor you a little bit.”*

(Interview B10)

If onboarding is successful, the newcomer should be a productive member of the organization as quickly as possible. Frequent personal reviews on successfulness and improvement areas should be utilized often. This would guide the newcomer in understanding and managing the expectations better which impacts role clarity.

*Another follow-up six months, nine months, then a year or however it has to be done. Just do something even though some people at the end will be like ‘we get it’ but at least it would be standardized.”*

(Interview B10)

*I would repeat [the induction plan] after a few months. Perhaps not completely but a few topics which are important at the start perhaps after three months just to know you are onboard and that you fully understand what is going. If not give some more explanation.*

(Interview B2)

This has been done in some business areas but is not a standardized practice especially in different regions. Often, it is initiated and organized by the manager.

*“For most of us we have the yearly PDA but in the case of the [newcomer in a country] we have had a follow-up every quarter. We set targets for the next quarter... and we check what products are sold to whom and what feedback has been received. What have we been successful in and what can be improved and even provide further training.”*

(Interview A1)

### 5.2.3 The Role of Socialization Agents

Socialization agents can play an important role within the socialization process by providing valuable information to the newcomer. In addition, as the sales role is extremely people oriented a lot of knowledge is acquired during employment and on the job. However, mentoring could be utilized to increase the knowledge of the newcomer. Mentoring also has an impact on self-efficacy as mentors can be utilized to advance newcomer confidence. Mentors provide accurate information on customer relationship management as well as problem solving and facilitate role clarity.

*“There is so much experience in this company like people working for thirty to forty years. All of these guys or ladies know exactly what to do and how manage*

*customers with this specific problem or case. This knowledge should be shared among new young people. A mentor for example is perhaps an idea. If you are in sales you should have a mentor who works in sales.”*

(Interview B2)

*“Yeah, I think that would definitely help and maybe having some sort of mentor not necessarily the line manager but some colleague they can turn to when they have some doubts or questions.”*

(Interview B5)

The mentor would be able to assist the newcomer informally with customer related questions such as volumes, products and pricing. In addition, the mentor is an indirect link between newcomer and the organization and acts as a guide for the newcomer in understanding the organization, organizational policies, and social networks. The mentor should also be available for a longer period and not only during the onboarding phase.

*“I think there should be some person nominated to like guide somebody for longer period. Not only to pass over the customer, to tell what the prices are, and what are the volumes and so on but also to tell more about company culture. How you should handle the I do not know... coffee machine, holidays, or sick leave and that person can feel part of the team and not be stressed.”*

(Interview B4)

*“For me really the mentor or the line manager has to establish all this information that the newcomer has to gather in their hands. But at the same time, it is very important that the newcomer can find whatever information [they] could have via intranet and internet by [themselves]. So, all the parameters should be communicated by the mentor or the manager.”*

(Interview B9)

The mentor should not be the line manager based on the hierarchy that this relationship would contain.

*“There should be some kind of mentor. The mentor would not necessarily be linked to the hierarchy of sales of the newcomer. So, it is very important that people feel comfortable when they come and [the mentor] can perhaps answer all the questions that they have and a mentor is really good in that sense. There won't be any judgement or whatever.*

(Interview B9)

Mentoring is not a practice that is done actively within the organization. The mentor's role is to provide the newcomer with confidence which increases newcomer self-efficacy. In organizations that have diverse teams operating globally, the mentor can be a valuable resource in enabling newcomer success. However, mentoring does impact personal performance as well because current duties and tasks take a reduced role.

*"It takes time because you really need to forget about your daily job when you want to concentrate on someone. ... but this is an investment in my opinion. In a way for me it was not a waste of time. Besides [person] already had a high knowledge of board competitors and everything so it was more a question of giving her more self-confidence after difficult periods and moments."*

(Interview B3)

#### 5.2.4 Impact of Remote Working on Newcomer Integration

With teams working globally, it can be difficult to build social networks that assist the newcomer in developing working relationships with different departments which enables integration to the organization.

*"You know it can go from any tools to work like phone and laptop whatever to a nice introduction to colleagues because today the working teams are European teams we are not in the same office so it is a bit more complicated to get to know each other particularly for the newcomers. So, this means that it is important that this guy or girl feels well integrated rapidly."*

(Interview B3)

*"Each of us has a different boss and we do not have daily contact with our sales colleagues. We have our own teams and sales people related to the products we sell, one person is in Germany, one is in Finland, one is somewhere else so when you are new somewhere in the country you might not know who to ask and which problem should I turn to which person."*

(Interview B4)

A remote assignment might not be the most feasible option when entering the organization from outside the industry or company because it can impact the newcomer socialization process in a negative way. Social network building within the organization influences social integration positively.

*“At the beginning [remote working] is maybe not the best way. So, I guess at first the newcomer should be able to be in an office with colleagues. They don’t have to be direct colleagues but at least to be part of this company. To feel how they can work, how they can communicate among all the colleagues and it is very important not to be at home during this period of integration.”*

(Interview B9)

### **5.3 The Role of Sales Strategy in Onboarding**

The sales force is constantly under pressure to perform better and generate successful customer relationships that yield results. In addition, sales strategy should have a positive impact on performance through appropriate customer segmentation, customer prioritization, developing relationship objectives and utilizing multichannel sales.

#### **5.3.1 The Communication of Sales Strategy**

Sales strategy tends to be a construct which is communicated top-down from the organization and introduced to the newcomer by the sales manager. However, sales strategy is altered based on the needs of the customer which requires sensing customer needs.

*“Yeah part of it comes from of course higher up and that might change quite frequently but with these large accounts we have our own strategy and we are just working on one for my account and this of course has to match with what the customer wants.”*

(Interview B5)

*“It comes down from the top down. Pretty sure the directors work on it, they go to the VP here and from there it is approved and then they just delegate it like right now it is get new customers.”*

(Interview B10)

*“Yes of course we have our guidelines and our direction which we need to follow. We do not have free game here where we can do whatever we like. They are given by the team manager or even higher and they are followed up closely by the team manager and during sales meetings that we have frequently and by calls that we have frequently.”*

(Interview B2)

Categorization of the customer base informs the salesperson about the amount of effort and resources allocated to each individual customer. Therefore, it is imperative for the newcomer to understand the categorization models utilized within the organization because it influences clarity. In addition, it enables active prioritization of customers.

*“Well we have our customer base and the customers have different categories so we know what service is dedicated to which customer category and also how much effort and how much time we should spend on each customer. So it is much easier to set priorities and we have the long term targets we have also short term targets.”*

(Interview B4)

The communication of sales strategy also influences the personal sales strategy which is developed by the salesperson for each customer. The purpose is to influence customers with applicable value propositions.

*“I think that is usually communicated to us by the sales VP on the direction of the management team. So from there we try to work out our individual sales strategy”*

(Interview B5)

*“The strategy would be to influence the customer. Every year we have the target which is explained by the CEO and VPs and we must follow those guidelines. Then our strategy would be to influence the customer to trust what Metsä Board is trying to do or trying to bring or trying to sell. The strategy has changed but what has remained the same is the good quality or good reputation that we have on the market. Even though the strategies, I mean goals are changing year after year what remains the same and what the customer has to hear is that we still work on consistency, on development, on good quality which remains.”*

(Interview B9)

Customer categorization is an indicator on the amount of resources utilized on different accounts and often it is based on the prices, volumes and payment terms of the customer. However, the salesperson should understand the differences between profitable and unprofitable customers. Customer categorization utilized within the segments should be introduced to the newcomer because it will impact self-efficacy and role clarity. Furthermore, the priorities of the organization tend to shift depending on the market situation and as clarified earlier, the previous industry or competitive environment knowledge assists in the socialization process.

*“I need to follow the strategy of the company. So I need to grow with the right customers, the customers that have good payment behavior and have the right conditions like right prices. So we have this customer categorization and first we need to grow with the partner customers so that is the long term goals but there is the short term goals. So we need to set priorities because the market situation changes”.*

(Interview B4)

Often, the customer actions which are influenced by the sales strategy are linked to the agreements made which involves realizing the benefits received from both the customers perspective and the organizations perspective.

*“When it comes of daily work, we have agreements and we have contracts, so the volumes are pretty much locked and the daily work is about making sure that everything goes according to the agreement. Then of course when it comes to extending that agreement or looking into the future there needs to be additional activities to make that happen to create an offer that is, that is something that is attractive for the customer.”*

(Interview B5)

In addition, the organization decides which products the sales organization should focus on and those are highlighted in the long-term goals that the company has. This is often influenced by the pricing of the products as well.

*“Now we the long-term goals that the company is targeting so we know what the company wants to achieve and with which products we want to grow and which products we do not aim to grow. We know the corner prices and we know the segments in which we want to grow and develop.”*

(Interview B4)

*“What a good salesperson should do is that it is not just to sell whatever you can sell at a good price or whatever, it is to really try to work towards the goal that management has set and the second thing is our own budget plan that we set the year.”*

(Interview B6)

Some regions are currently designing regional targets because there was no clear guidance on the focus areas of the organization. This provides the salesperson with increased clarity on the actions the salesperson should undertake.

*“We have a team target that contributes the overall unit target meaning Metsä Board Americas and then individually now we are breaking it up to regions to try to more effectively target rather than flying all over we are looking at you know expenses vs. sales kind of things. Prioritization of the accounts and things like that from a micro view.”*

(Interview B8)

*“When I was first hired I was kind of on my own and now having a new boss for less than six months we are still building an understanding as in our team structure, strategies and focuses. [...] We are focused, our focus and understanding in the direction of how we are going to take and manage the business moving forward because we never had that. I didn't have it when I first started.”*

(Interview B11)

Loyalty is an indicator of effective prioritization because the salesperson comprehends which customers require the most effort.

*“First it is what the company sets and the priorities but what I personally do is that I prioritize the customers that are loyal. There are a lot of customers who stop buying by the price increase, they are daily looking for spot offers”.*

(Interview B4)

### 5.3.2 Onboarding into Target Setting

Sales strategy guides target setting of the newcomer which is supported by the manager. Targets provide the newcomer with clarity and should be discussed openly. However, an understanding of the market position is important within target setting.

*“During my job interview the general targets were introduced but it was too early to set up the clear targets like volumes and figures. For the person who does not have previous knowledge about volumes or market share this could scare her so the clear targets the more personal targets should be setup after the training setting.*

(Interview B1)

*“I was kind of given the macro view. Here are our targets for the Americas this is what we need for turnover, price, this is what we need for tons, make your contribution. [...] but no real clear-cut objectives other than here is the macro, get this business qualified, put them in to the mix and make that contribution and lets grow that business internally kind of organically.”*

(Interview B8)



Occasionally targets and guidelines are changed or are not clear. However, guidelines are provided with regards to the customer decision making process. In addition, some rules are not clear and might differ between the segments within the organization.

*“I could not say I follow any guidelines today because there are not any, it really depends who you are working with. So there is no such specific answer for this there are many. Of course we have guidelines regarding decision making with customer, price wise, volume wise whatever, and it is easy to understand for everybody. Rules are quite clear in my opinion. It is not maybe the case in every organization inside Metsä Board as far as sales network is concerned.”*

(Interview B3)

*“Targets and tasks should be clearly defined which sometimes is not the case not only to newcomers but I think some of the senior ones do not even know their targets, clear targets and tasks or they are changing on a quarterly basis. But yeah, I think first of all the person should be aware what are the expectations clearly.”*

(Interview B5)

Implementing a single method based on sales strategy will not benefit the business because customer relationships are complex and require adaptation which requires utilizing different selling models. Clear communication and knowledge sharing between the supervisor and the salesperson assist in decision making which influences performance and self-efficacy. In addition, the experience of senior employees could be utilized further.

*“I do not know if it is that easy to make one single rule for everybody because people are dealing with different types of customers. So we need flexibility which we have. There cannot be only one principle. No no, this is not possible. But then like I said as far as my boss is concerned guidelines are really clear I know where I can make a decision and where I need to request his support. Nothing really complicated here.”*

(Interview B3)

*“If you start at a company and have certain guidelines then of course you will be able to use them faster and implement them faster in your own work. On the other hand, there is experience and there are guidelines. If you have guidelines and next to that you have experiences of a person who has worked in sales for thirty years I feel like those two should be combined.”*

(Interview B2)

However, organizational sensemaking is required between different regions because sometimes a selling model or method might not be feasible within a similar context because of cultural differences between regions which influences a salespersons ability to serve the market. This requires improved communication towards upper management which should align with salesperson actions.

*“A business plan if you will I think helps identify things that 'ok, these are the things that we need to help' rather than one structured here is your text book on 'how we are going to sell' because I am going to be honest, the Finns have different ways of how they view... in my experience the perception of how things should be done don't necessarily fit with the culture at least in the market that I am servicing”.*

(Interview B8)

### 5.3.3 Responsibility and Power of Salesperson Actions

Best practices indicate the amount of responsibility and power the salesperson has within the organization and customer. In addition, it provides clarity with regards to the actions of the salesperson.

*“We have the code of conduct so which we need to follow. Second, all the colleagues from the beginning were underlining that together we need to be honest with each other, we should be open-minded, share our ideas, and share our problems.”*

(Interview B1)

However, the salesperson must be adaptive to customer needs, but the salesperson understands that there are principles which must be followed which the customer must accept.

*“Of course it is good to be aware and share best practices and so forth but customers are different and you have to adopt to them. When there are some rules and principles then of course customers have to accept certain things but you cannot force your way of working to them it is more like that you have to listen to your customer.”*

(Interview B5)

The parameters provide the salesperson with clarity on the actions that are allowed and often are based on company policies.

*“I mean from a procedural stand point I work better if the parameters are defined almost like 'ok here are the boundaries now create your plan'. Most of it is common sense or it could be ethics based things or company policies. If those things are outlined most people in a professional standpoint that have experience in sales or account management or business in general usually know how to work within those parameters and set something up that fits their style.”*

(Interview B8)

Customer culture may differ in other countries and in these cases the responsibility of the salesperson is to understand the position of the company. The understanding is also a basis for developing business with customers and managing accounts appropriately. In addition, an added element of personal reputation may play a role especially in Asian countries.

*“The customer culture in Asia is different from US or Europe. People in Asia are more flexible in some things. First of all, this means that they are flexible and they have all kinds of angles to talk business with you and they are not following all the rules. Sometimes you need to be very clear what is our position to deal with them and then, most of the customer relationship is based on your personal reputation.”*

(Interview B7)

## **5.4 The Role Customer Relationship Management in Onboarding**

Customer relationship management is significant in an industry where relationships are valued because these can be utilized to build competitive advantages. Sales strategy guides the formulation of personalized customer relationships with customers.

### **5.4.1 Establishing Introductions to Customers During Organizational Socialization**

Introductions are an important aspect of forming customer relationships for the first time. This can be facilitated by colleagues or by the manager who have experience with customer management. Introductions in a somewhat traditional industry with close personal relationships still hold a great deal of value and the newcomer will feel more successful when introductions are initiated and supported by a socialization agent in the organization. This builds confidence and influences the perception of

successfulness because support is easily available which related to self-efficacy, role clarity and integration.

*“I think the way it went with me was quite good which means that my line manager at that time was doing my current role as well and step by step I took over customers and he was less and less involved. This is how you learn the best as well. Get the introduction to the customers then you start to negotiate by yourself and if necessary, ask questions.”*

(Interview B2)

*“[Person] really passed over the whole knowledge to me and helped me build relationships with customer. [The person] went with me to each and every customer not only introducing me but also having some kind of dinner, not job-related talks so it was much easier to build the relations with customers and I think that part went much better than my previous induction.”*

(Interview B4)

*“I think the best way to start visiting customers is with an experienced colleague because it is much easier to be introduced by someone because then in most cases you start with better relations with the customer.”*

(Interview B1)

Without proper introductions, it can be difficult to start building customer relationships or continuing to build value due to the price orientation of customers.

*“I see that [building relations] was quite tough but from the other hand it was quite different market where the relationship was not really... (thinking) well the price played the main role. So it was more about that and it was quite difficult not having any recommendations from anyone introducing me. I was somehow left alone.”*

(Interview B4)

However, successful past experiences can be utilized to engage with customers for the first time when a customer base is handed over. Previous experience in successfully developing customer relationships is an asset in these situations.

*“It was very much freestyle left up to me kind of how I was going to pursue these and then I just used my past experience and things that I felt worked with accounts in my past life to be able to start managing and get my head around the accounts that I was working with or inherited.”*

(Interview B8)

When considering the successfulness of building customer relationships, it can be a long-term process which takes time and effort. The successfulness of building customer relationships can also impact the perception of the newcomer within the organization. This has influences social integration and self-efficacy. Successful customer relationships are an important aspect for any newcomer to a sales role with successes reflected towards the organization.

*“It depends on which angle you look at the situation. I mean being part of the company and feeling like being part of the company can take in my opinion six months. Having the feeling that you are accepted by customers and colleagues it is in my opinion two year’s work. Simply because the customers are testing you and depending on your successes this gives an image to your colleagues. Good or wrong but whatever action this newcomer is doing has an impact on the image he is having inside the group”*

(Interview B3)

In addition, the forest industry is somewhat traditional and integration to a company can also take time as there are established methods of operating which have not changed radically.

*“One thing I noticed in the past where I worked, [specific] industry by the way, it is in this industry everything is really traditional coming through customer relationships. [...] It takes time to establish this business and to establish relationships with customers and to work yourself into a company like this one. It at least takes two years I feel to have it all under control.”*

(Interview B2)

#### 5.4.2 The Development of Trust with Customers

Building trust with customers is important in the advancement of successful customer relationship. Trust is a combination of multiple actions done by the salesperson that incorporates technical knowledge, company image and interpersonal skills. However, trust is significant in building loyalty and value with the customer which should drive profitability to the organization.

*“You have to start to build trust I think is the first thing. As far as building loyalty, value and profitability for the company, ultimately you have to build trust first. So you know, not selling something to them that they can’t use or trying to help find a resource.”*

(Interview B8)

Technical knowledge of the products plays an important role in successful customer relationship management. Technical knowledge can be a facilitator of trust because customers appreciate the salespersons knowledge about specifications. In addition, technical knowledge reinforces sales argumentation of different product grades. However, building trust is a complex process that takes time. Purchasers may have more experience than the newcomer and therefore, onboarding should assist the newcomer in building the appropriate knowledge to be able to manage customers successfully.

*“The person should get the training form the technical department about different board specifications, about potential issues with regards to competition, comparing our products with competitors to know the differences, what are our pros and cons, and be prepared in answering these questions from the customer. We should be prepared before going to customer visits”.*

(Interview B1)

*“[Technical knowledge] is really something that you see as important. People need to have the knowledge of board. All the purchasers at all these customers they stick around for a very long time and [the purchasers] have more experience than I do.”*

(Interview B2)

Successful customer relationships have an impact on potential business development with customers. In addition, once a trustful relationship is reached with the customer, the potential price sensitiveness of customers might reduce.

*“Well you can see clearly with the success in the business. From the moment the customer is calling you when he is looking for technical information that does not belong to your own areas of action, like board from competitors this means that this [person] starts to trust in you. He has full trust in you and it is very long process. I mean customer are always testing you just to see if you are reliable or not, if you are able to provide correct information they are looking for, if you are reactive. You know everything that you can be seen as a reliable supplier. But it is a long process I mean here we talk about trust and trust is not for free. You earn it but you can't buy it.”*

(Interview B3)

*“Very important because if you build up this relation with the customer then in the end they trust you and if you say them, ‘Better try this board I know it is a*

*little bit more expensive but it going to work better with your machine and it's going to work better for your customer.' Once you have this trust they test it even though it might be more expensive. So they trust you on your knowledge."*

(Interview B2)

Actions are done in order to maintain the bonds created between the salesperson and the customer. In this case, the image of a trustworthy partner by providing quality and executing on promises assist in the development of customer relationships. In addition, customers' value the helpfulness of the sales people in solving complex issues with the help of different departments within the organization. Value is co-created together with the customer when an understanding of growing together is reached and value is provided to both the customer and the supplier.

*"I think that customer should trust us as a company. So we should build trust and relativity by supplying constant quality by keeping the promised delivery times as a company. I think what customers appreciate is that they can get help from us. It is not only that we sell products, but we also offer services, we offer technical analysis, we offer technical help. When customer have problems like our competitors fail to supply, we do our best to help and of course it is crucial to visit customers. We share with them our knowledge about trends, about innovations and so we treat customers not only as somebody who we want to sell our products to, but we want them to feel that we understand their business and we want to help build their business and grow the business together with them. Not that they should buy and pay us but they can get something out of that so they can grow with us."*

(Interview B4)

*"Whenever we have a discussion on price and allocation and what is the upcoming years business with [the customer] we usually try to break down the ice with them and try to look at it as a common goal together meaning that we will try our best to support them in their businesses. In return we need to understand more on how they can actually support us in terms of the sales and the volumes and then we try to come to some sort of compromise."*

(Interview B6)

*"If you feel the relationship is going to a trustful relationship where customers' tell you information which is actually out of the basic information like 'we have a project going on for 10 tonnes', if he actually starts to tell you information about insight and information about the company or the way they are working or about competition then I think you know you are in a good relationship."*

(Interview B2)

The agreed terms of a contract also influence the ability to build trust with customers.

*“Well I would say that [building trust] is a very technical route and to build the trust with the customers I would say that it is more on us delivering what is agreed in the agreement with the customers meaning the price, the validity, the allocation and the shipment. So all of these things are a little bit [thinking]... it can be concrete and it is also a little bit intangible in the agreement. As long as we follow what has been agreed with the customer it will help to build the relationship”.*

(Interview B6)

However, the ability to manage the expectations of customers also depend on the interpersonal skills of a salesperson. Often customers are managed with a personalized approach which requires an understanding to the customer base.

*“So different people speak different languages and have a different mindset so you need to be very flexible in mindset first of all then secondly your interpersonal skills is the most important to deal with all these kinds of people. They trust you not because where you are from and what your background is but sometimes it is based on your own skills, your own service and how you talk to them. They cherish this.”*

(Interview B7)

Building trust relates back to customer relationship management because it a long-term process. When customer portfolios have changed internally within the organization it has had a negative impact on the trust creation process because of the longevity of relationships. Sometimes this has not been considered by management.

*“The first thing that I have noticed is that the trust is built on the long term. [...] Our managers or top manager should take into account that relationships are built on the long-term view. This means that all these changes regarding the organizations that we have faced has an impact which it is not positive impact on the business because of course we cannot build confidence, trust, loyalty with customer when the sales manager, or the sales directors, or in the sales force is changing all the time.”*

(Interview B9)

#### 5.4.3 The Formulation of Personalized Customer Strategy During Organizational Socialization

Customer relationship management involves collecting customer information and developing unique selling approaches to be successful. However, there are many



different means of building customer relationships and which requires adaptation from the salesperson.

*“A million-dollar questions because there are as many ways of handling customers than there are customers. It is a question of adaptation first of all and you cannot say at the first meeting how the customer will react you need many meetings, many phone calls, many exchanges to start to have a clear picture. From that picture you then adapt your strategy and speech mainly to these customers.”*

(Interview B3)

However, the ability to understand existing opportunities within the customer influences the newcomer's role clarity as it becomes evident which actions can be taken with regards to each customer based on a need's assessment. After visiting customers, the newcomer will start to understand how each customer prefers to engage with the organization.

*“So every customer is different and every segment is different. When entering the company to any specific segment [the newcomer] should be informed what are the opportunities within the customer. What this customer likes, what he doesn't like, what is the customer's way of working. Some are organized and some are not organized so for every customer you need to find a way to work with him. Also, people are different. Some are introverted while others are extroverted, so I think sometimes you need to adapt or you need to know that this person doesn't fit or doesn't match specific customers. This is something you cannot give from the beginning, but you need to be flexible to change”*

(Interview B1)

*“I think every customer is unique as far as their what expectations are and what their needs are. First the contacts, understanding who the decision makers are, then a needs assessment, okay is this just a continuation of business or you know are there growth prospects within the company.”*

(Interview B8)

*“I would say that it really depends on the different type of customers. [...] I would say that they key is to understand the person in charge and try to work out your interaction with him.*

(Interview B6)

Given that a needs assessment has been conducted, the salesperson understands the different types of accounts currently within the customer portfolio. There are multiple ways to categorizing individual accounts but often they are grouped as growth,

stagnant and prospect accounts which differs from the organizational categorization. In addition, it is important to understand who the key decision makers are within the separate accounts.

*“First identifying the account type, growth or maintenance and those are the big categories, or is it a prospect all together and brand new one. Then once I know that then understanding who the people are, who are the players, and then you know a needs assessment as far as the overall but also the individuals, are they price motivated, are they delivery motivated, what are their experiences with past suppliers those kind of things. Then identifying the opportunities based on those things and trying to align them with your resources, time, energy, money, travel, whatever to best fit and support that.”*

(Interview B8)

*“Basically what I have done as far as strategy, I have three terms. Defend, capture and grow. Defend accounts are basically the accounts that are already established in the account. Growth is basically you want to grow specific business within those excuse me, defend accounts. Capture are your prospects. My goal is anywhere two to three new prospects per quarter to make that happen.”*

(Interview B11)

The ability of the salesperson to understand the customer involves comprehending customer preferences and being able to understand correct communication methods with the customer. The salesperson needs to adapt to each customer in an individual way and provide a picture of a company that is unified. Some customers require support and close contact while others are business oriented. However, people are all individuals and therefore, there is no method that truly works. Individual approaches with an adaptive mindset to customer relationship management are the cornerstone of any successful newcomer to sales. In addition, often it can be a ‘feeling’ based on the signals and actions that the customer provides as a cue that relationships are developing successfully.

*“Well when we speak with customers about product, about the trends, there are customers that first ask about the price and conditions and then you realize there is no kind of understanding. It is also some kind of feeling about the customers after multiple meetings. After one meeting it will be difficult to judge but it is important when the newcomer comes to the company that he gets some kind of customer base.”*

(Interview B4)

*"I wouldn't say there is this typical guide. We do not follow a handbook. In sales everyone has their own way of working and there is no correct one or a bad one it is a different approach."*

(Interview B2)

*"You just have to know the customer and once you identify if they are a prospect and they are, you just need to identify what their needs and wants and demands are basically. You know we provide a service in our value and our satisfaction so that is a given from Metsä"*

(Interview B11)

Depending on the account, the approach changes to a team oriented one which involves different departments in order to serve the customer better. In addition, there are regional differences which salespeople must consider.

*"I know customers who feel like the less they meet the better it is because it means that things go according to plan and nicely, no troubles. But then my other customer is very demanding and requires a lot of skype calls and face to face meetings on different levels and it just defined what level of meeting requires whom. Normally it is then the key core team of two or three."*

(Interview B5)

*"It is all based on the customer but then it also depends on the actual business that you are going after. Because you got to remember based on us being here in North America there may be some solutions that we can offer but there are some components that we have to take into consideration."*

(Interview B11)

The ability to influence customer decisions also relates to the power a salesperson has within the organization. Sometimes this process can be inefficient to salespeople.

*"As a salesperson when you go out and face customers, how customer see you, are they seeing you as only sales staff or you do have your own influence within Metsä because when they talk about price negotiations, if every time you need to go back and ask the head office you lose a lot of power. I am just like a communicator in front of customers. I just transfer the standard price to the customer then it is very inefficient for me. I need to show more power, I need to show them I am an influencer because if you give me last order or give me some promising business I can give you a good price, I can fight for you, I can do something to help you that is more valuable."*

(Interview B7)

Customer strategy relies on the cognition of the salesperson to understand the bigger scheme in selling a technical product. In order to be successful, the salespersons role is to successfully persuade the customer in understanding the benefits the organization provides. This directly relates back to the importance of technical knowledge.

*“You are not selling 80gram paper sheets. You are selling a technical product. The moment you can put your finger and point the real issues with the request then you can offer an alternative and this is the key in my opinion today. Not looking only at the demand from the customer but taking a step backward and looking at the global picture and then seeing what can fit to this request because maybe they are going in a totally wrong direction.”*

(Interview B3)

Previous experiences and learnings taken from other companies are also utilized in a sales role. In this case, the salesperson understands principles of key account management and incorporates those to the current role. This involves understanding of key decision makers as well as account planning on different levels.

*“There is different step for key account plan and management so first of all we understand the market potential for this customer and then to understand our self or the existing market share that we have, where is the room to grow, and then second thing is the relationship management to this key account, who are they key persons to talk with, who are the influencer, who are the people who need to put in the list and then thirdly we need to plan our daily, monthly, quarterly, or yearly exercise for this key account. [...] It was different step and different tools that I learnt but basically tools do not matter but the concept of key account management.”*

(Interview B7)

## **5.5 Sales Technology and Onboarding**

Sales force automation and the availability of different tools is quickly changing the landscape of the sales role. Companies have a variety of different tools available which can be utilized to increase salesperson performance and should yield results to the organization. In addition, SFA can be utilized to process a variety of different information originating from the market, from customers and internally from the company. Utilizing customer knowledge efficiently to build customer profiles and analyze customer buying behavior requires advanced tools that are user friendly and if

done effectively, should yield potential new opportunities for the business and even help with product and service offering development.

Current tools and software within the organization support information gathering and are enough for the sales role. However, the tools currently are not the most user friendly and require time and effort to understand which necessitates support from the organization. This can have a direct impact on productivity and adoption of sales technology. Understanding the difficulties and being able to work around the obstacles influences the salesperson ability to find answers. In addition, training facilitates the adoption of new tools even for sales personnel who are more senior.

*“[IT tools support communication and building relationships] very good in a way. I mean you can find any information in our system, but it takes time to be in a position to understand how it works and to apprehend the difficulties and then of course know where to look to get a quick answer. But in terms of tools I think we have what we need. What is missing is training. Decent training with the tools even for old dinosaurs like me.”*

(Interview B3)

In addition, important SFA should be promoted inside the organization because a newcomer can get lost quickly with the number of tools available. New tools should have the user in mind in order to make them more approachable to the sales organization and benefits of utilizing these tools should be highlighted. This requires proactivity and an understanding of the benefits these tools can bring to a sales role.

*“It is a bit like the first jungle when you start digging into all of these IT tools.”*  
(Interview B9)

*“Yeah I think Metsä has quite advanced tools already. I think I am quite familiar with them, but I am aware that it is not really well promoted and you need to want to learn them and to use them because not all of them are user-friendly. It is not easy to find information because you have different tools so you first need to know in which tool you should look for which information so I think a newcomer is lost in that but the tools really support sales because you can find almost enough information to work with your customers and build relationships.”*

(Interview B4)

Training could assist in tool adoption however, even with training the sales organization is not quick in adopting new tools and technologies that assist in the daily

work. In addition, sales is a customer facing role and admin in the form of training can hinder the adoption of the tools if salespeople do not see the clear benefits. Training requires user support which sometimes has been lacking.

*“If I want to be honest I would say no [to quickly adopting new tools in the sales organization]. [Training could help] but you know you will always have people complaining that there are too many trainings, too much admin.”*

(Interview B3)

*“Training for example for CRM and some of these systems has been kind of piecemeal. It has been 'ok here is the app, or here are the things, and you go here you do this' and it is not very comprehensive.”*

(Interview B8)

*“Also some kind of IT training to be able to get to work because everything is now about IT tools”*

(Interview B4)

In addition, age influences the ability to utilize IT system in the sales role because previous experience of senior salespeople has been associated with personal relationships instead of managing sales tools.

*“The balance is hard. At the same time doing all of these forecasts... using a CRM tool which is basically very good. It is a good tool but it is not so easy for everyone to use especially when you are closer to sixty... Sales is very arduous compared to what it was 10 year ago especially for those who are not used to it. “*

(Interview A1)

When considering onboarding of newcomers, tools should be introduced early in the process so the newcomer has time to learn the tools and understand what tools can be utilized to correct information. This would also mitigate the potential anxiety that may arise if the newcomer does not have close contact with colleagues. Providing information on the key-users of tools builds a network of contacts that should support the newcomer and influences social integration. In addition, introduction early should build confidence because the newcomer understands customer information and assists in integration.

*“I think that should happen in the beginning. First of all to know which tools are available and which tools should be used for what and what information you can find. Also to set separate training. People should be aware who is the kind of key-user in the system so where he or she should turn to get some more information.”*

(Interview B4)

*“The first month people are discovering everything so it is the perfect moment to introduce our IT tools. When they visit the customer for the first time they know where to look to get statistics, payment terms and so on. It's the key in my opinion. Managing the tool pretty well helps with the integration because they will feel more independent.”*

(Interview B3)

Expectations for the newcomer should be clearly defined which can impacts the tools the newcomer is willing to adopt. In this case, learning the different IT tools is also time consuming. Newcomers need to understand the information that can be acquired from sales technology which has an impact on role clarity. In addition, many salespeople are in home offices where daily contact may not occur and they do not have the link to other colleagues.

*“I think first of all the person should be aware what are the expectations clearly because there can be a serious disappointment and this also concerns the tools because we are now using more and more [IT tools] which came in the past few years. These things are pretty time consuming and then the person is not fully aware what to focus on and can easily get lost especially in sales where you have many people based in home offices where they do not have the link to their colleagues. For a newcomer it can be very difficult and the newcomer might feel lost.”*

(Interview B5)

*“I don't know and we are not always told where stuff goes and who uses it or who needs it. So an understanding of the systems and what the real function is would be very helpful for us because it gets very confusing”*

(Interview B8)

For a sales-oriented role, tools should be introduced before the newcomer starts going to customer visits in order to build confidence. The ability for the newcomer to process and understand customer information builds confidence in individual abilities and assists in integration to the team. In addition, many daily tasks are utilized with IT tools and therefore, training should be done early in the process.

### 5.5.1 CRM Software

In order to build a customer-centric organization, customer data should be maintained, managed and utilized effectively within the organization. CRM software is significant in newcomer integration because it contains most of the customer information that the newcomer requires when entering the sales role.

*“As sales we use CRM which is very good tool for finding information, for sharing information, for finding back your own information even. Everything is there so it is a very useful tool for sales. It only needs development.”*

(Interview B2)

*“The CRM is the foundation of the history between Metsä Board and the customers or the end-users or the prospect or whatever. I mean if it is used properly you can find everything and you have the knowledge that you have to know before going to the customer and this is really good in that sense.”*

(Interview B9)

As a basic function, the CRM provides the salesperson with information with visit reports, account summaries and pricing information which highlight the products and grades that have been sold to the customer. Some actions are automated like an account summary that is sent to the salesperson before customer visits.

*“After every visit we have visit reports which are put to CRM. I think this is information which should be shared with new employees.”*

(Interview B1)

*“The CRM tool gives you a summary report of that customer before you enter it. I think it is a day before your meeting starts. It generates this report and that is something which is very useful because you see all the last memos, you see all the figures up to date and that a very good tool.”*

(Interview B2)

*“For sure we work in CRM so that is the basic tool that helps us manage customers where we have price lists, all the reports, and we can do the follow-up so that is a basic tool.”*

(Interview B4)

Given that activities are tracked in CRM it is also utilized to share information with the organization and managers. This improves the transparency of the information flow



within the organization. In addition, price agreements are often stored in the CRM which provides clarity on the pricing structure and potential opportunities within customers.

*“So first when visit customer we share our visit reports. Our management colleagues my colleagues someone who is European key account manager responsible for this customer is also sharing his visit reports and information which involves this customer. So I think we have quite good and transparent information flow.”*

(Interview B1)

*“One of the things we could share our knowledge is that we have CRM. So basically every time we go to a meeting we look in all the reports and also the current price agreement and certain opportunities that we are involved with the customers and also the trials. So whenever anyone needs any additional information about a customer they themselves can look in and then read all the reports and some information, and then if they have additional questions of course they can look for the individual account manager for clarification, or approach the you know sales director for more information as well.”*

(Interview B6)

The newcomer needs to understand the actions done within the accounts and that information should be shared when entering the organization, but CRM should not be a focal point of information. Nevertheless, newcomer proactivity is important and information can be gathered by discussing accounts with experienced colleagues or the account team which may be indicated within the software.

*“In CRM we have opportunities for each and every customer so we need to follow that. This is also linked to the trails that we have at customers and the crucial thing is that we need to get the business to build the relationships and that is not only the salesperson but it is also customer service and the technical team that should support this so the customer sees us as a company as a whole so we need to work together having the same understanding the same priorities”*

(Interview B4)

*“I think even more important is to get information from colleagues who are dealing with this customer as this is the best knowledge they have. There is no one way, the best way is to try to collect this information from colleagues and to read the system.*

(Interview B1)

Utilizing CRM however is not as simple because it can be very time consuming and a slow process. In addition, if the CRM is difficult to use in daily work, it takes time away from visiting customers.

*“It is sometimes not so easy but I will say overall it is still a very positive thing because CRM makes it easy for us to look for customers information very quickly and easily it is just that the steps involved sometimes are very time consuming.”*

(Interview B6)

*“Now I must say that it is a bit tricky to use it in full because it is time consuming so definitely yes, the CRM would be a good tool to introduce to the newcomer and you can see even any other markets if you want to. It is a good European view.”*

(Interview B9)

*“What I have noticed is that CRM creates difficulties with many and that many do not have the opportunity to familiarize themselves with all of the IT systems. They know how to do it but it goes very slowly. Meaning that the general complaint is that everything relates to IT systems and that they do not have time to visit customers.”*

(Interview A1)

In addition, the CRM does not always support the salesperson with planning because it is very account specific. Some salespeople work with accounts that are country based and it can be hard to plan regional objectives strategically.

*“One thing that I have observed is that that the CRM in Metsä is very good, very systematic but then in planning point of view it is not efficient [...] go to CRM and take out the information on customers then you have knowledge. You saw the memo, you know what is happening but then but then there is long term planning for this country. We do not have a proper document or presentation to see this year planning.”*

(Interview B7)

The CRM system provides the salesperson an understanding of the decision-making process within the account. In addition, it provides clarity with sales funnel management because it provides information on the key actions taken within the accounts. In addition, the account team within the customer account is the contact point for information and adjustments that might be needed when managing customer relationships.

*“Of course we can use it with the CRM and it is very easy to see where we are in terms of decision making process from the customers. If we need adjustments not only is sales involved but also the technical side and if necessary, the credit control department. So the sales funnel starts with the identification, price offer, tests, sometimes they go hand in hand and at the end decision making after the trials.”*

(Interview B3)

*“I think one of the things we could share our knowledge is that we have CRM so basically every time we go to a meeting we look in all the reports and also the current price agreement and certain opportunities that we are involved with the customers and also the trials. So whenever anyone needs any additional information about a customer they read all the reports and some information, and then if they have additional questions of course they can look for the individual account manager for clarification, or approach the sales director for more information as well.”*

(Interview B6)

However, the CRM tool currently is quite basic and does not provide all the necessary information. Additional tools create a bigger picture and requires input from other tools which might have been learned in different roles within the organization.

*“We work in CRM so that is the basic tool that helps us manage customers where we have price lists, all the reports, and we can do the follow-up. Then there is also SAP business warehouse you can do different reports like invoicing reports, stock reports, order inflow so that is something I use daily but I guess many sales people cannot do that report themselves. This is something I learned in customer service so that ability I have from previous experience.”*

(Interview B4)

CRM is also utilized in a team selling approach by consulting the account team within the account. However, it requires proactivity to follow the accounts and the summaries that CRM generates automatically.

*“In CRM we have released opportunities for each and every customer so we need to follow that. This is also linked to the trails that we have at customers and the crucial thing is that we need to get the business to build the relationships. This is not only the salesperson but also customer service who should support that, it is also technical team that should support that, so the customer sees us as a company as a whole. We need to work together having the same understanding the same priorities”*

(Interview B4)

*“[CRM serves the purpose] when it comes to meeting minutes and I think yes if people really use it. The problem with CRM that you have to follow the customer to get the reports and if people just do not feel that important then they might not get information so it is a useful tool.”*

(Interview B5)

*“The only thing is missing are small notes from customer service for example. They have the daily contact with the customer and if they have for some reason a question or remark from a customer they can tell us and call us. But if it's there on your summary report you can see it and ask the questions to the customer. So that is something to be developed which would be nice”*

(Interview B2)

CRM also assists in understanding what are the previous actions done within an account and requires active updating from the sales staff. However, sometimes accounts are not updated and when role changes occur, there can be misalignment of information. In order to correct possible issues, the sales manager must proactively support the redevelopment of relationships.

*“It was interesting because there was a lot of information flow that was lacking and a lot of things that were not documented so it was a process of getting to know the people on the procurement and supply chain side for those accounts better than the production people which I was already familiar with. So a lot of it was cleaning up other people's messes in some cases”*

(Interview B8)

As the CRM tool is the cornerstone of customer information, it is imperative to maximize the utilization of this tool as it can break down silos between different business segments.

*“Information is shared with a very accessible tool like CRM and you can find anything only if sales account responsible are fulfilling it. If they do not it is a total blackout. So the biggest danger for me is the people who are not using this tool as the corner stone for business development. That is how I see things. Communication between segments is quite complicated because even if we work in the same company there are some silos.”*

(Interview B3)

Some sales personnel view the CRM tool as a form of accountability. In this case they understand that it is imperative to track activities done with customers because it assists in understanding the customer timeline of activities.

*“As far as accountability in that. We use CRM in which we do a lot of the memos to be able to track that. Along with writing the stories up if you will based on your meeting and followups which is very important and one of the things that I do just so... which is very beneficial for me is putting a timeline in that action, action frame”*

(Interview B11)

## **6 Discussion**

The following section discusses the primary research conclusions that can be drawn from this study. In addition, the research questions will be answered with a final word on the theoretical and managerial implications.

### **6.1 Expanded Research Framework and Theoretical Implications**

The findings indicate that there are multiple factors that can contribute to the development of a successful onboarding program that socializes newcomers to their respective role. As elaborated by Klein and Polin (2012), onboarding is the organizations capability to socialize new employees effectively to their roles and in this case, the study focused on the sales organization within a company. The research framework introduced in the beginning of this study can be expanded by utilizing the findings to indicate important aspects in developing onboarding models for the sales organization (figure 13).

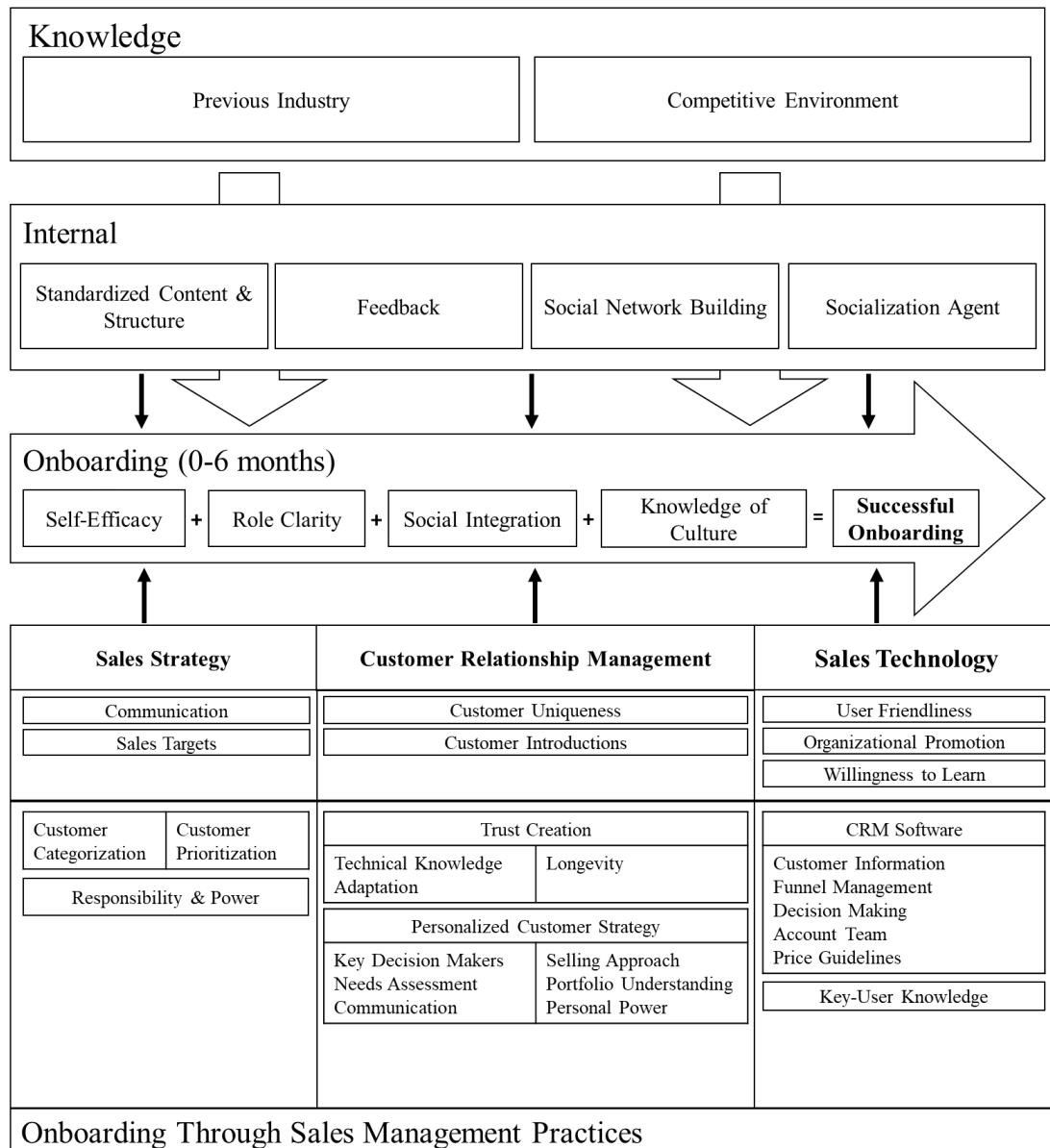


Figure 13. Expanded Research Framework

This framework provides an overview on the characteristics that organizations should consider when developing onboarding programs that focus on capturing important aspects from sales management to quickly integrate newcomers to the organization. The findings discovered that there are three distinct levels in the expanded framework that influence onboarding which are industry knowledge, organizational factors and finally the specific sales management principles.

There are two knowledge factors that accelerate the socialization process which are previous industry knowledge and competitive environment knowledge (figure 13).

The competitive environment is represented by factors such as competitors, market trends and developments, sales argumentation and product information which is subjective to the newcomer's previous experience. The knowledge of the competitive environment is an understanding of the environment in which the newcomer is embedded to. Industry knowledge meanwhile is the knowledge about the forest industry in which comparability does not hinder the socialization process as sales methods and in some aspect, the working style is similar. With these knowledge factors, the newcomer understands the boundary that is crossed when entering the organization and they assists and the socialization process (Chao 1994). Interestingly, if the newcomer does not have previous knowledge extended support and organizational resources should be allocated to facilitate the socialization. However, the background of the newcomer entering the organization was not discussed within the context of this thesis and is a potential avenue for further research in a longitudinal study investigating previous industry experience and the effect on the duration the newcomer socialization. As an interviewee mentioned, it may take up to two years to feel comfortable working in the specific industry.

The duration of onboarding is not specific and this study indicates that the previous experience of the newcomer impacts the duration of onboarding. Organizations play a focal role in facilitating this process. In addition, the results imply a timeframe between two weeks to six months. However, this study also indicated that onboarding occurs when the organization facilitates actions that assist in integration. On the other hand, socialization can be considered as an approach to understanding the role clearly and the ability to perform at a desired level which may take up to two years. Therefore, this study also supports Jokisaari and Nurmi (2009) findings that assistance is helpful even up to twelve months post entry. Organizations should attempt to utilize feedback to understand the needs of the newcomer and develop support models that assist newcomers past the onboarding stage.

There are multiple internal factors and sales management practices that influence Bauer (2011) research model of onboarding (table 6).



Table 6. Internal organizational factors and sales management practices impact on onboarding

<b>Factor</b>	<b>Impact</b>
<b>Internal Organizational Factors</b>	
Standardized Content & Structure	Self-efficacy Role clarity Social integration Knowledge of culture
Feedback	Role clarity
Social Network Building	Social integration
Socialization Agent	Self-efficacy Role clarity Social integration Knowledge of culture
<b>Sales Management Practices</b>	
Sales Strategy	Self-efficacy Role clarity Knowledge of culture
Customer Relationship Management	Self-efficacy Role clarity Social integration
Sales Technology	Self-efficacy Social integration Knowledge of culture

The internal organizational factors of content and structure, feedback, social network building and socialization agents influence the factors identified by Bauer (2011). The results indicate that organizations should focus on content and structure that is standardized, provide opportunities for feedback, assist in social network building as well as provide a socialization agent (figure 13).

Standardized content and structure provide an environment in which the newcomer acquires the relevant knowledge necessary to be successful within the organization. The content should be similar across regions in order to provide a unified method of socializing newcomers. This would also provide a unified view of the company to newcomers entering the organization. Standardized content should cover aspects of the organization such as values, history, organizational structure as well as inform the newcomer about the segment or business area which the newcomer will focus on. Therefore, it is important to cover aspects about the strategy of the organization, introduce targets, increase customer understanding, and build competencies in

managing the account and product portfolio. Social integration can be increased by introducing the newcomer to the different departments of the organization whom the newcomer will most likely be working with to achieve company goals. Within the sales technology aspect, this could be in the form of an account team found in the CRM system. In addition, a clear structure should facilitate organizational introduction. Feedback should also be provided to the newcomer as it increases role clarity. As the data suggests, some teams have periodic reviews and utilize session for discussion on successes and possible failures. Additionally, feedback could also be utilized to further improve the onboarding process. The results indicate that onboarding should be developed in an institutionalized and formal manner which supports previous academic literature (Jones 1986; Saks and Ashforth 1997; Bauer et al. 2007; Saks et al. 2007; Klein and Heuser 2015).

Socialization agents also play an important role during the socialization process of newcomers. Within the context of this study, salespeople understand that the organization has a wealth of experience within the sales organization which could be utilized. Of note are mentors because they assist in information seeking and provide social support (Bauer et al. 1998; Klein and Heuser 2008). As mentors can be a low threshold contact point to the newcomer, a sales specific mentor can disseminate important information about the organization, answer important questions with regards to customer relationship management, and provide social support influencing self-efficacy, role clarity, social integration and knowledge of culture. However, as with Klein and Heuser (2015) findings, mentoring is not currently utilized within the organization to facilitate newcomer adjustment and mentoring has been utilized if it has been necessary. When a salesperson takes on a mentor role, it can have an impact on current tasks because the mentor must arrange time to facilitate the newcomer to the organization which supervisors must recognize. The role of a sales specific mentor could also be studied further within the sales organization context by studying in-depth the mentor-mentee relationship and the methods of acquiring information. Social network building is also important and with salespeople. With the rise of working from home and home offices, the newcomer might not have the opportunities to build valuable networks with colleagues if they are assigned to a home office reducing social integration.

Sales management aspects of sales strategy, customer relationship management and sales force automation (figure 13) also have an impact on onboarding. The findings indicate that the impact should not be neglected when developing organizational socialization programs (table 6).

Sales strategy relates to the activities that the organization performs in order to provide value to the firm and salespeople are the key translators of strategy towards the customers. Sales strategy should not be overlooked when developing an onboarding program because it is closely related with understanding sales targets derived from sales strategy. In the context of onboarding, the clear communication of sales strategy impacts newcomer self-efficacy and role clarity. Salespeople understand that customer categorization and prioritization occur at an account level to maximize the benefits to the organization which is also dependent on the current sales strategy. However, salespeople must be active early during socialization to understand their account and product portfolio to identify the opportunities within each potential customer. Strategy is developed by upper management and communicated to the sales organization and the results support Panagopoulos and Avalonitis (2010) notion that sales strategy shapes sales force behavior and can drive customer relationship management performance. The effective implementation of sales strategy provides clarity on the accounts that are important. In addition, the selling methods depends on customer uniqueness which requires adaptation from salespeople and supports Terho et al. (2012) findings. Responsibility of actions and power towards customers provide a boundary in which the salesperson can operate within each customer. These two aspects relate to internal policies such as code of conduct and are important to review with the newcomer and influence knowledge of culture. To conclude, this study discovered that sales strategy impacts newcomer self-efficacy, role clarity, and knowledge of culture.

Customer relationship management combine the actions taken by salespeople in order to build value and profitability to the organization. Customer relationship management is often a construct of establishing trust between the salesperson and the customer where trust delivers value and profitability to the organization. This study discovered that introductions are an important aspect in the establishment of trustful relationships. In addition, the development of trust with customers can be a long process which

requires an adaptive mindset. However, the experience of buyers can result salesperson anxiety if sufficient training is not provided.

The ability to build trust with customers relates to the technical efficacy of the salesperson and an understanding of the product and service portfolio is imperative to develop successful relationships. A key indicator of the development of trustful relationships is information seeking done by customers. Furthermore, this study supports Terho et al. (2012) findings that price sensitiveness of customers can be reduced after successful development of customer relationships in which promotion of other products and services is possible. Conversely, customers are unique which requires adaptation from salespeople in understanding the preferred methods of communication with customers. During the encounter process, it is important for the salesperson to reach a common goal with the customer where the value communicated both ways (Payne and Frow 2008).

Developing trust is also a key component of value-based selling efforts of salespeople within B2B markets. Töytäri et al. (2011) identified five key practices in value-based selling of which sales-centricity and finding the right customers are supported within the findings of this study. As the organization is not a dominant player in some regions, the ability to translate the attractiveness of the offering to the customer should yield results but requires detailed training on the technical aspects of the product portfolio. The salesperson must also understand the customers business as well as potentially the business partners of the customer to propose feasible and attractive solutions. Furthermore, the newcomer should learn how to translate and perform proper value assessments depending on the customer which once again, requires an understanding of the product portfolio. Introductions to different departments which build social capital within the organization should assist in serving the customer better when offerings are relatively complex. Within the context of the process framework for value-based sales, the study indicates that the process framework is supported (Töytäri et al. 2011). The process begins with understanding the customer by conducting needs assessments and relevant analysis in which a clear understanding of the product and service portfolio is crucial to communicate value and position the offering to customers. Mutual target setting and quantifying business impact is often done during the customer meetings which value can be co-created. Target setting, impact

quantification, negotiations and the verification and documentation is often conducted with the CRM system. Therefore, the CRM assist in customer decision making and supports account management.

Finally, the successful communication of business strategy influences the customer strategy where several different factors need to be considered (figure 13). The findings suggest that organizational changes can have a negative impact on relationships which should be recognized by management. After understanding the customer portfolio and the key decision makers, it is important to also understand the needs of the customer as a unique customer strategy is developed which is a preface for relationship maintenance. Information sharing such as insights about trends, innovation, and developments within the sector occur with the buyer at the encounter phase of customer relationships (Payne and Frow 2008). Furthermore, the understanding of the customer product portfolio influences the selling approach that is utilized within the customers. The study indicates that customer relationship management influences self-efficacy, role clarity and social integration (table 6).

Sales technology is essential because it facilitates the development of customer relationships and the current tools are feasible. The most important factors to consider when attempting to increase adoption are user-friendliness, organizational promotion and willingness to learn of salespeople (figure 13). When introducing and developing new tools within the sales organization it is important to ensure that the tools are user friendly as this has an impact on adoption and usability. In addition, the findings indicate that adoption of new tools can be considered as slow which requires increased organizational promotion and are in line with Mathieu et al. (2007) findings. The study also indicated that salespeople must have a willingness to learn new sales technologies. With the increased use of Internet of Things (IoT), blockchain, and the possible avenues of augmented and virtual reality (AR/VR) the pressure to comprehend and utilize complex sales technologies could increase which puts pressure on the organization to develop learning methods and models especially for those who have been in the organization for extended periods of time. The perception of commitment to technological change and embracing new technologies within the forest industry with an emphasis on the age factor is an interesting avenue for further research.

Business intelligence tools can be utilized to reduce newcomer uncertainty and anxiety by providing critical information about the market situation and structure if the newcomer does not have previous industry knowledge. In addition, business intelligence tools assist in the formulation of customer relationships because market trends and developments can be discussed in the encounter phase of value creation (Payne and Frow 2008).

Customer relationship management software was the most significant in the sales organization as it contains all the data and history about customers which assist funnel management, decision making and provides important information about the pricing guidelines. In addition, the CRM system also contains information about the account team which can assist in developing the social network in the organization. This supports Park et al. (2010) findings that information from the market should support customer interaction and relationship quality. In addition, CRM increases transparency between the salesperson and the manager because information can be shared which is easily accessible. However, to be able to find more detailed data other tools can be used but are not seen as mandatory. The extent to which tools the newcomer should know is unclear and the number of different tools can be an impeding factor in newcomer tool adoption. The findings suggest that sales force automation impacts self-efficacy, knowledge of culture, and to some extent social integration.

## **6.2 Managerial Implications**

The results of this case study have several managerial implications for top managers, sales managers and human resource professional in organizations that would develop onboarding and organizational socialization programs. The insights provide a basis for developing onboarding programs in organizations:

1. Newcomers require support when entering a sales organization in which customer relationships are crucial for business success and for newcomers who do not have relevant industry knowledge, extended support is required.
2. The timeframe of onboarding should be more long-term and have a similar structure across regions. Consistency provides a unified view of the company.

3. Newcomers should acquire knowledge about the organizational targets as well as personal targets which support the activities of the business or segment.
4. In order to implement new sales tools to an organization, managers should understand the needs of the sales force and understand the feasibility of each tool. Adoption of sales technology is resultative of user-friendliness, organizational promotion and willingness to learn. Access to tools and sufficient training should be provided to the newcomer.
5. Socialization agents in the form of mentors are appreciated within the sales organization and assist in newcomer integration.

Developing onboarding programs that support socialization can be an extremely difficult task as it requires a clear owner. Often, communication is lacking between the hiring manager and the HR department especially when newcomers are hired to global companies. The timeframe of onboarding is also quite individualistic because it is relative to the previous experience of the newcomer. This should be considered when developing onboarding programs as others might require extended support. A clear timeframe of 3-6 months was indicated within the context of this study however, socialization may take up to two years. Annex 2 contains ideas that could be utilized when developing sales focused onboarding programs that combines researched literature and themes from this thesis which were presented to the case organization. When the proposed onboarding is planned at a strategic level, the end results should have a positive influence on customer relationship development and relationship experience when the newcomer starts to engage with customers. Within the confinement of this study, onboarding is an organizational activity that facilitates newcomer learning while successful organizational socialization results in newcomer satisfaction related to confidence and performance.

### **6.3 Limitations and Further Research**

With any research there are several limitations which need to be addressed. As this is a single case study the results should be treated as such and therefore, the lack of generalizability must be acknowledged. In order to increase generalizability, onboarding and organizational socialization should be investigated further within forest products companies in Finland and possibly abroad. Furthermore, the research

method is explorative that utilized semi-structured interviews for data collection. Future research could take a quantitative approach in identifying the importance of sales management principles within the onboarding context of sales personnel. However, the findings could be utilized within organizations developing onboarding programs.

Even though candidates for interviews were carefully selected and represent the organization from different regions, the fact remains that the interview participants work at the current organization which can result in bias. Both response bias and interviewer bias may affect the data sample and must be acknowledged. Additionally, even though interviews were conducted in English most participants did not have native level English and hence, ideas and thoughts could be lost in context and translation. However, to improve the results it would be interesting to view the opinions of onboarding and organizational socialization from human resource professionals responsible for talent management. This method could identify the gaps in responsibility and communication that might occur after the hiring process and during integration which would complement the findings.

A final limitation within this study is that the three sales management principles focus on sales strategy, customer relationship management and sales force automation which are somewhat diverse topics with extensive amounts of academic literature. Additional research longitudinal in nature should focus on the learning factors that influence organizational socialization in the sales organization. The implementation of organizational socialization programs in organizations could also be researched to identify success factors and hinderances that effect onboarding. However, this study provides important information and direction for further research.



## 7 Conclusion

As the expanded research framework indicates, the process of integrating newcomers to a sales role can be considered as quite complex. Therefore, based on the findings and the following discussion of the expanded research framework, the case study attempts to answer the proposed research questions defined in the introduction:

1. How do different factors in the onboarding program assist in successful integration to the organization?
2. How do salespeople understand their customers and develop relationships which should be conveyed to a newcomer in sales?
3. How do salespeople respond to sales strategy within the organization which a newcomer should understand?
4. What is the role of sales technologies when salespeople develop relationships with customers?

The first question attempted to discover which elements facilitate onboarding for the program to be successful. First, the role of socialization agents especially in the form of mentors assists the newcomer in multiple different ways. The mentor in this case can be a connection between the newcomer and the organization in which experience and knowledge is distributed. This knowledge can relate to customer relationship management, sales strategy and in some cases IT tools and software. However, the power dynamic of the relationship should not be an afterthought because the mentor should make the newcomer feel comfortable within the organization. This may not be possible if the mentor is a direct line manager. In addition, the duration of onboarding is important because it assists in the ability to comprehend information. In this case, a 30-60-90-day model could be utilized with discussions on the potential successes, failures and improvements for the next period. However, the findings suggest that there is a socialization process which may take up to two years after which the newcomer is integrated to the organization. Finally, as the salesperson is the key contact point between the supplier and the organization, the ability to understand how different departments within the organization work is important for success.

The second research question attempted to understand the motivation behind developing customer relationships as well as understanding how newcomers should start to engage with customers by gathering appropriate customer information. Within this context, customer relationships are quite complex which requires sales-centricity, but introductions established by colleagues towards customers assist in the development of customer relationships for the newcomer. The essential features to successfully manage customers involve understanding customer information, developing appropriate value propositions, technical knowledge, and portfolio understanding. When these are effectively utilized, the salesperson should be able to demonstrate value to the customer and provide solutions which are appreciated. However, many of these actions are learned with experience and by actively visiting customers which might be difficult tasks at the beginning of employment for a newcomer in sales. A sales mentor could convey some of this information and experience to newcomers within the sales role. In addition, the salesperson must be adaptive to customer needs and the ability to understand the inner motivation of building business is essential. This requires the salesperson to actively conduct needs assessments, craft appropriate selling approaches and maintaining power to make decisions regarding customers that are accepted within the organization. Finally, the organization must also understand that the development of customer relationships is time consuming which should be reflected in the onboarding program. When developing an onboarding program for newcomers, it is important to provide information and focus on aspects that build customer information such as customer end-uses, preferences and market knowledge. Account management principles should be highlighted that reinforce the development of relationships and consist of funnel management and decision making, account planning and the factors that assist in trust and value creation. Developing relationships is assisted by knowing the account team. Pricing and contract management should not be neglected either.

The third question focused on sales strategy and the relative impact on salespeople within the organization and how this influences newcomer perception of sales strategy. Sales strategy which is communicated top-down from the organization is associated with sales targets. The interpretation of sales targets informs the salespeople about the amount of resources that should be spent on each customer. Often these are related to the products that the organization hopes to achieve growth in while maintaining

business with satisfied customers. In addition, customer decision making which often relates to the power the salesperson has should be clearly understood by the newcomer. For the newcomer, a general understanding of sales targets does influence socialization positively, yet the personal targets should be introduced after because this might induce anxiety within salespeople especially those who are new to the industry. Target setting could be related to the personal development and appraisal process. When developing onboarding programs, it is important to elaborate on aspects such as customer segmentation and categorization schemes as well as expanding knowledge on the product and service portfolio. However, aspects such as pricing guidelines and should not be neglected either, even though these aspects did not get as much attention in this thesis.

The final question attempted to discover how sales technologies influence the development of customer relationships and in this sense, which tools should be introduced to the newcomer. The findings indicate that for a salesperson, the knowledge and utilization of CRM software is important because it contains most of the customer data even though it does have some shortcomings. Business intelligence tools and other supportive reports aid in market understanding as well as customer information gathering which should be utilized to build knowledge especially for those newcomers who do not possess industry knowledge. As the CRM software provides customer information, supports funnel management, assists in decision making and provides information to the newcomer in the form of the account team and pricing guidelines, the knowledge of CRM is imperative for customer relationship management and development. Other tools that could be utilized in sales are often learned from other positions which might not be promoted within the organization. However, with the development of tools, it is important to ensure that tools are user friendly and should be piloted within the sales staff. In addition, organizational promotion should increase adoption of sales tools however, management must also understand the demographics of the sales organization to craft appropriate strategies to increase adoption.

The aim of this study was to discover which elements of sales management should be included in the organizational socialization process to accelerate the development of newcomers in a sales role in which the development of relationships occurs over time.

As the expanded research framework indicates (figure 13), sales management principles provide multiple aspects that should be considered when developing organizational socialization programs that assist the newcomer in integrating successfully to the organization. This paper constructs a foundation from which multiple pathways maybe taken to study this phenomenon further. Finally, this paper provides clarity with regards to onboarding within an organizational context and provides much needed insight to this specific academic field which has primarily focused on practitioner-oriented literature.

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## **Annex 1: Interview Questionnaire**

### **Background Questions**

1. What is your current role within the company?
2. How long have you been working for the company?
3. Have you changed roles inside the company?
4. Could you tell me more about your background before joining the company?
5. Could you explain what the current onboarding process is like?
6. Do you find that the onboarding of employees has been successful?
7. How are successful sales skills/capabilities identified and developed within the organization?

### **Onboarding Questions**

1. What do you think is a successful onboarding program?
2. How long do you think an onboarding should last?
3. Where should a newcomer find information about IT tools and how to use them?
4. What tools does the newcomer need to know to be successful in the role?
5. How are these tools taught inside the organization?
6. What knowledge should the newcomer have to understand the sales role?

### **Sales Management/Account Management Questions**

1. Could you tell me how you manage your sales activities?
2. How does sales strategy influence your way of working?
3. How does it get implemented inside the organization?
4. What are the sales management principles the newcomer should know?
5. How does sales management knowledge help with newcomer integration to the team or organization?
6. How is information about sales management organized inside the organization?

### **Customer Relationship Management**

1. Could you tell me how you manage your customer relationships?
2. How do you build loyalty and profitability with customers?
3. How do IT tools support customer management?
4. What is important to take into account when teaching a newcomer about customer relationship management?
5. How do sales processes support the development of customer relationship and managing customer activities?

## Annex 2: Onboarding Development Ideas for Case Organization

